2019

StableMaster Quick Reference Guide

IAN HUGHES FEB 2019

Welcome to StableMaster

Hi, thanks for taking the time to check out StableMaster.

StableMaster is a fully featured software solution designed for Riding Schools, Stables and Equestrian Centers. It has been designed by horse people and developed by software professionals. We pride ourselves on the fact that we are constantly striving to make StableMaster the best it can be whilst being the most cost-effective software solution on the market - we actively seek customer feedback and act on it. If you have an idea, let us know what it is, and we will make every effort to add it to the StableMaster feature list.

StableMaster is hosted on the latest technology in the cloud meaning it can be accessed from anywhere at any time provided you have an internet connection. Your data remains protected by Amazon's ISO27001 security compliance and we never share your data – ever.

You can contact the StableMaster team by email or through our interactive in-app chat function. We always respond promptly and are always happy to help.

The following guide has been produced to help you get the most out of StableMaster. We hope you find it useful.

In the meantime, I'd like to express my sincere thanks for your interest in Stablemaster and hope this is the beginning of a long and fruitful relationship.

All the very best,

Ian Hughes

Ian Hughes

Founder, StableMaster

Contents

Configuring StableMaster

Configuring StableMaster is key to getting the best out of it and unlocking all the features. When you create your trial instance the first thing you should do is head over to the settings panel and start configuring StableMaster to suit your needs. Without going through this process StableMaster will not function effectively.

Accessing General Settings

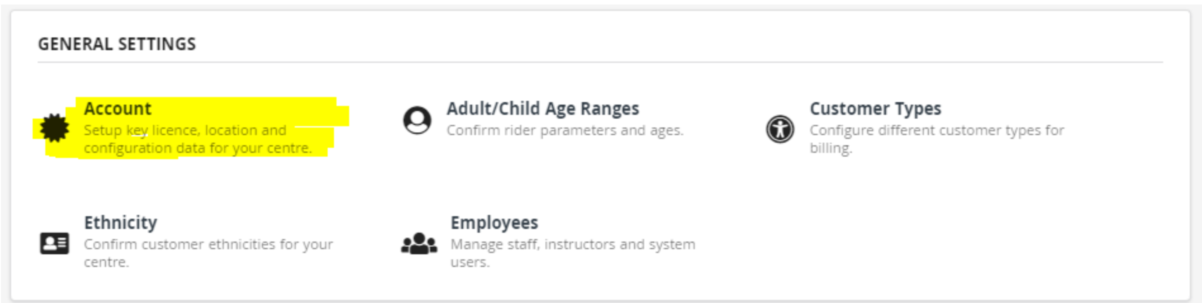
Once you’ve logged in head over to the settings icon to the top right-hand side of your Stablemaster screen.

Click once on the **Settings** icon to open the overall settings page. Click on the button and you will be presented with a plethora of settings options. First thing to setup is your Account detail.

Hint: Settings can be altered, added and removed at any time – they are not set in stone!

Adding your Account information

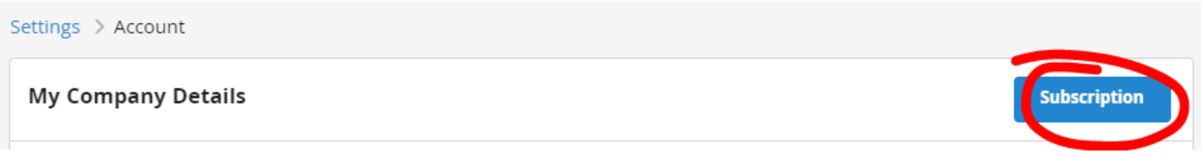
First thing to setup is your Account detail.



This section is self-explanatory but crucial to get right. Go ahead and enter key information pertaining to your business in each of the provided fields. Some fields are obligatory, others optional – but we strongly recommend you complete them all, but be sure to enter your banking and tax details as they feature on invoices generated by the system. Time zone and currency are also important.

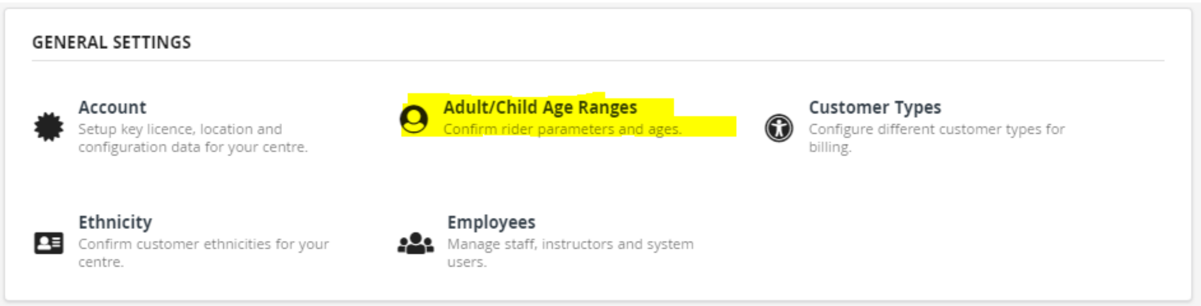
Managing your Subscription

In the account settings you will also notice the blue button which gives you access to your subscription information.



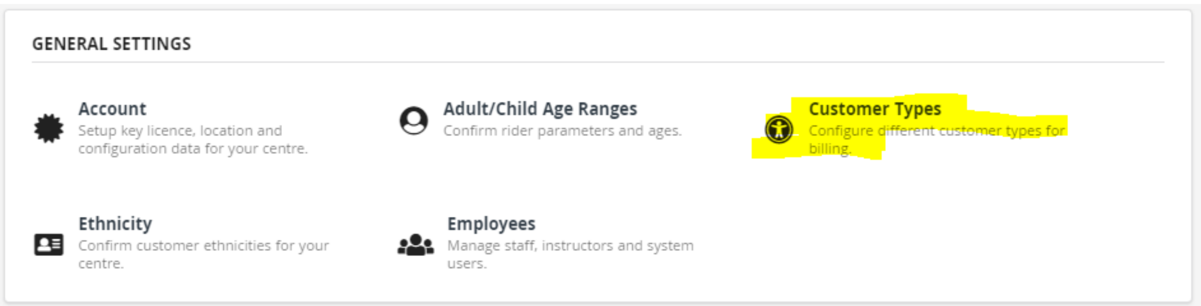
Only the **System Owner** can access this area – the system owner being the person who originally signed up for the StableMaster trail, normally the business owner senior manager. Click on the **Subscription** button and you will be presented with the detail of your current subscription and plans available. From this page you can choose and change your plan or cancel your plan should you need to.

Adding Child/Adult Age Ranges



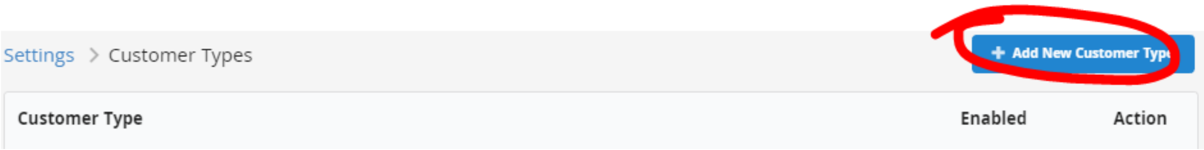
The adult and child ranges are used to dictate the criteria for billing against lessons. Although not mandatory, many riding schools like to distinguish between the two so we have included it as an option.

Creating Customer Types

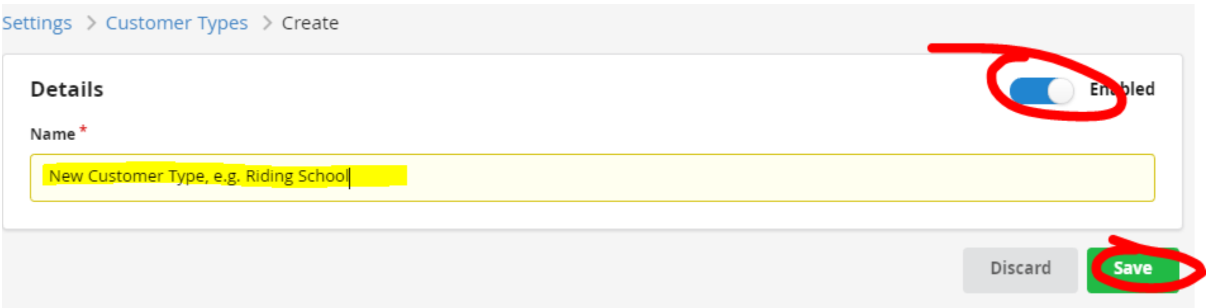


It is vital that your customer types are setup. Most business have numerous customer types such as; Riding School, Full/Part Livery, Senior, Junior, College etc. You assign a customer type to each new customer you setup so that you can then report on revenue by type for instance. Take time to think about the different customer categories you might have and add them.

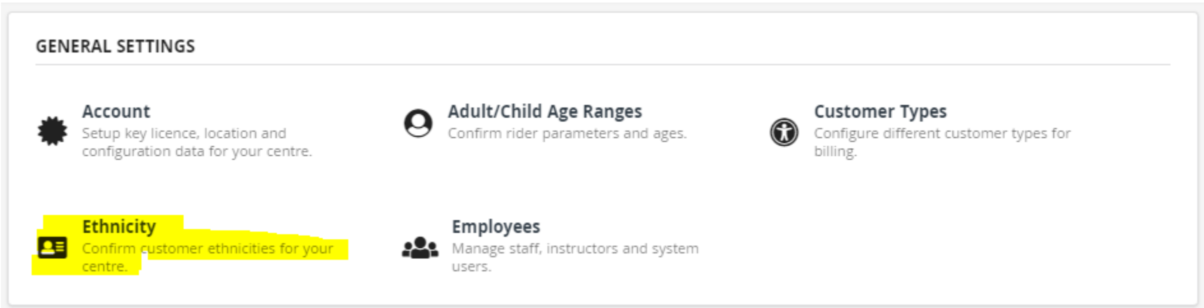
Adding a customer type is simple. Simple **Click New Customer type**



Add the detail, e.g. “Riding School” or “Livery”, then click **Save.**

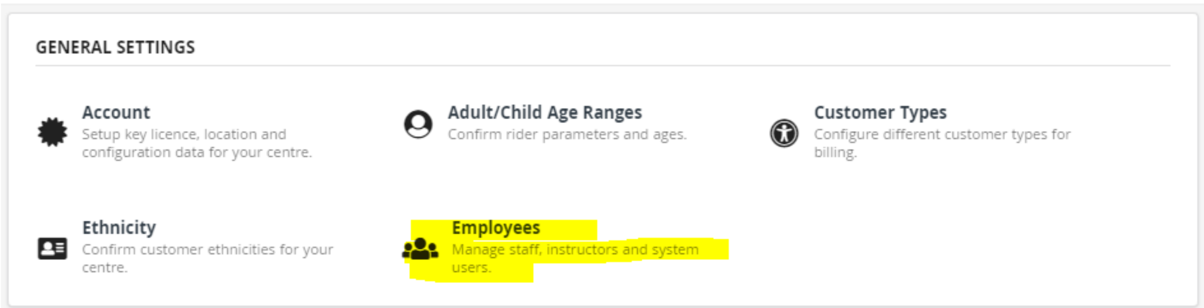


Adding Ethnicities



Not mandatory but useful for demographic reporting purposes, for example in the UK there is a drive to introduce greater numbers of ethnic minorities to horse riding.

Setting up your Employees



Setting up your employees in StableMaster is crucial if they are to be able to; assign and be assigned tasks, instruct lessons, issue invoices and care for horses. In StableMaster there are 3 roles and a limited security model. The below table describes the key differences between these roles.

Access Level	Owner	Administrator	Employee
Can access subscription area	✓	✗	✗
Can create new system users	✓	✓	✗
Can reset system user passwords	✓	✓	✗
Has access to all other functions	✓	✓	✓

Roles are further explained:

Owner; the individual who originally signs up to StableMaster, normally the business owner, also has full control over all aspects of the system including the subscription.

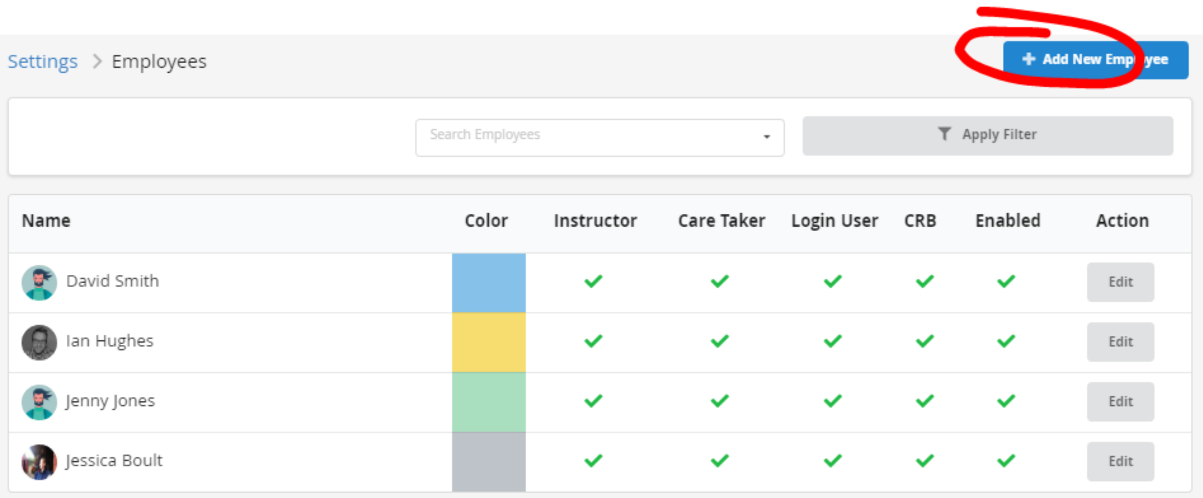
Administrator; has the same privileges as the owner including the ability to setup new staff in the systems but **cannot** change the subscription.

Employee; can access all functions but cannot setup new staff or change the subscription.

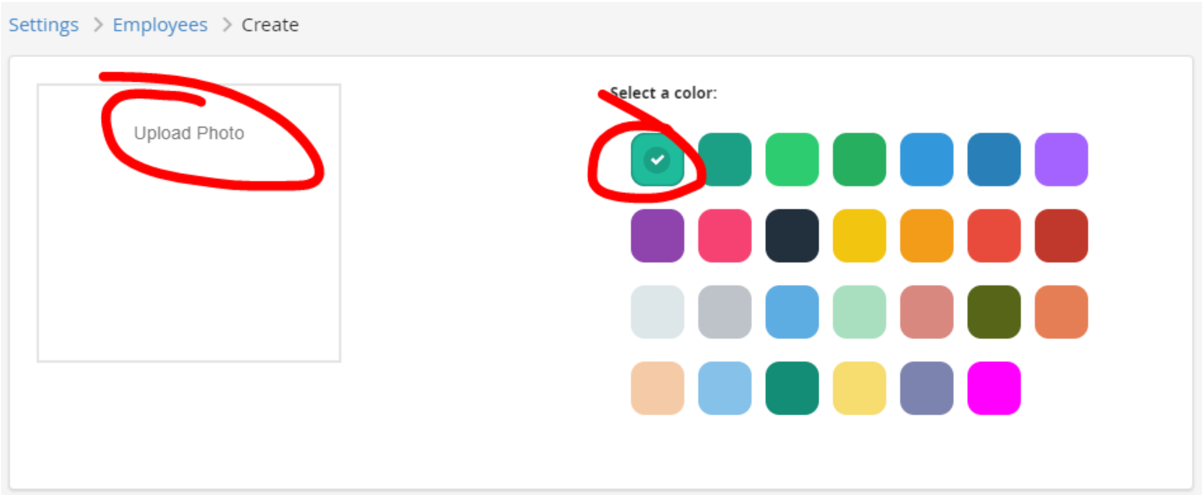
Hint: Consider very carefully the roles you allocate to your team to ensure you maintain control of your system.

Adding Employees

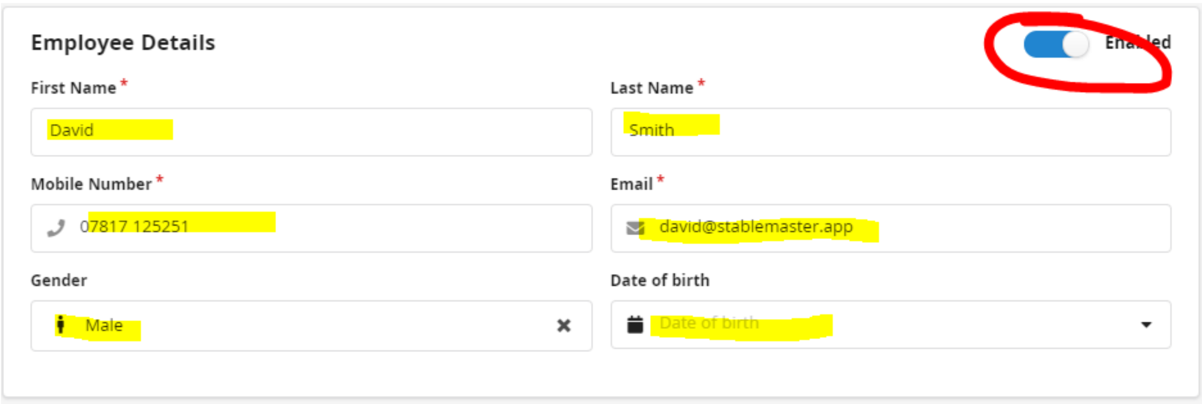
Let's now go ahead and add a member of staff. Click on the Employees icon, then add new employee.



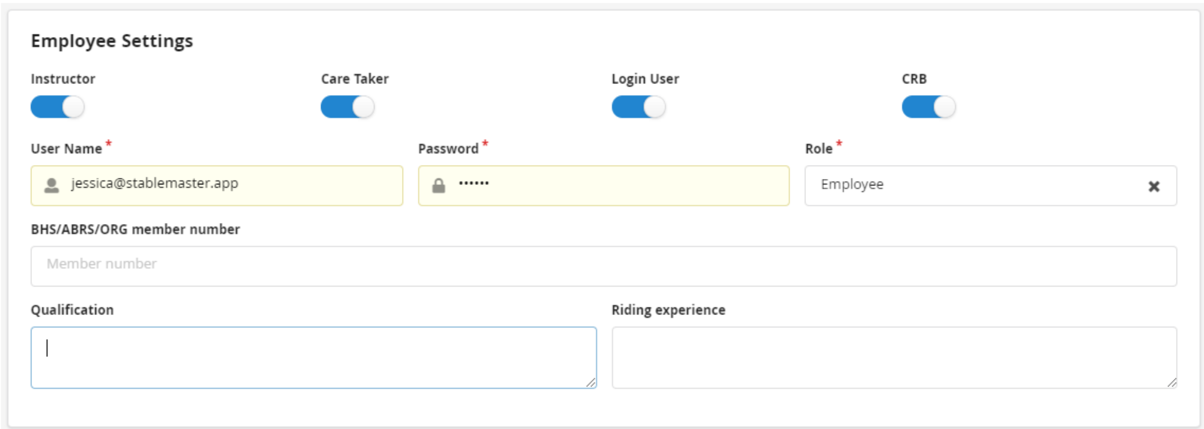
Next, upload a photo of the member of staff (not mandatory, but nice to have) and select a color for them. The color selection allows you and the member of staff to easily identify themselves in the Calendar view.



Then enter all the individual staff member detail in as much detail as possible. Note the Enabled button – you can enable or disable a member of staff by simply clicking this switch.



We now need to define the employee role both in the system and in the wider organization. Lets look at each of the settings below in turn.



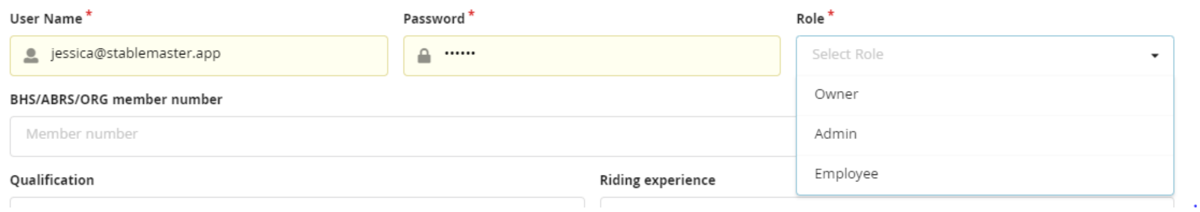
Instructor; dictates whether particular employee be assigned as an instructor for riding lessons or classroom-based learning for example.

Care Taker; can this member of staff be assigned tasks related to horse care and operational tasks.

Login User; determines whether this member of staff is to be granted access to login and use StableMaster.

CRB (Criminal Records Bureau); does this member of staff have a current CRB check in place enabling them to work with children.

Check the appropriate settings. If the staff member is assigned as a **Login User,** then complete the **user name** and **password** fields.

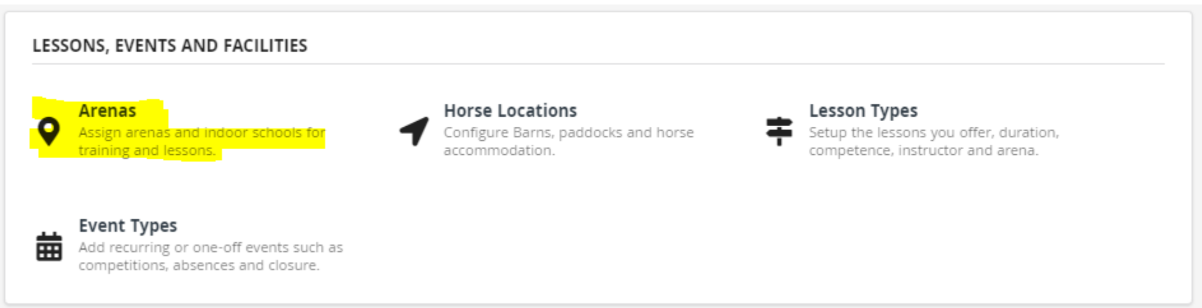


Usernames **should always be an email address so that the employee can request a password reset if needed.** Set the password to something simple (the member of staff can always change this later). Select an appropriate **Role** for this staff member – refer to the roles explanation presented earlier.

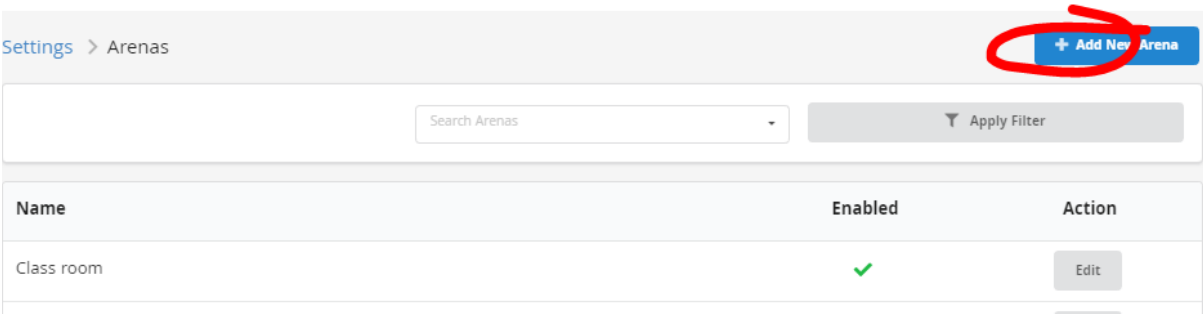
Then complete the remainder of the staff setup options. **Not forgetting to press Save when you have finished.**

Good Work! You've now added your first staff member – go ahead and set the others up in a similar vein. You've now completed the first part of configuring StableMaster – let's move on to setting up Lesson and Event types, Horse Locations and Facilities.

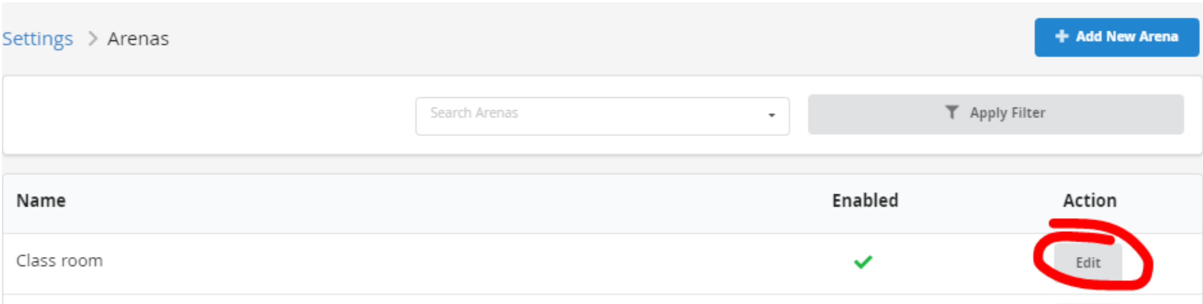
Adding Arenas, Paddocks and Training Facilities



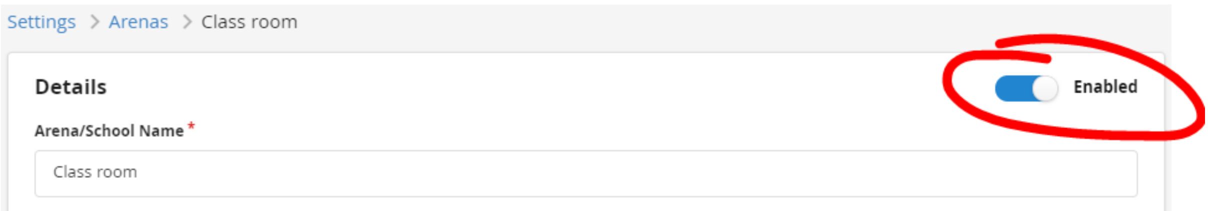
Setting up your Arenas creates bookable resources in the system, for example; a training paddocks; indoor arena, cross country course, classroom or meeting room. Basically, any resource you want to be able manage the availability of and allocate to lessons or events can be added here – just use your imagination! To add a new arena just click on the blue button and crack on.



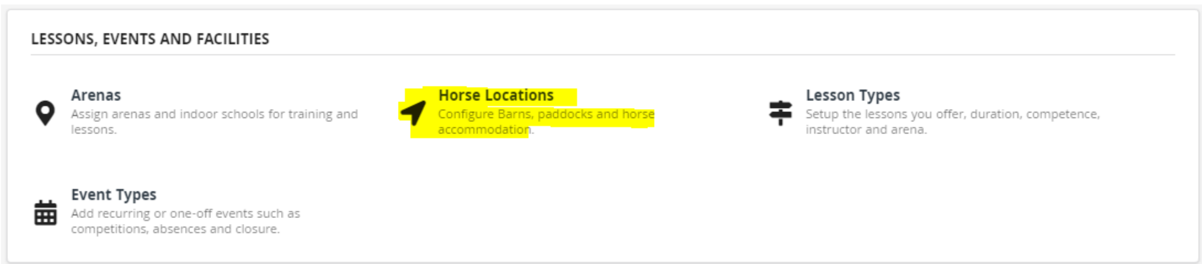
If for whatever reason you need to disable a bookable arena (for example if it is a classroom and it is being refurbished) simply disable it by, clicking on the **Edit** button, and…



Clicking on the enabled switch thus disabling it meaning it cannot be booked.

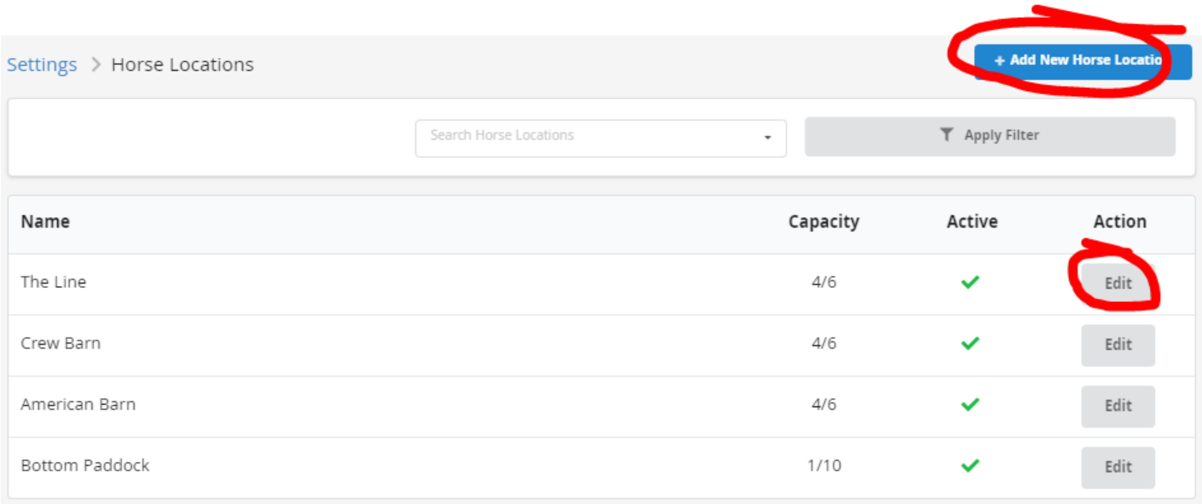


Configuring Horse Locations

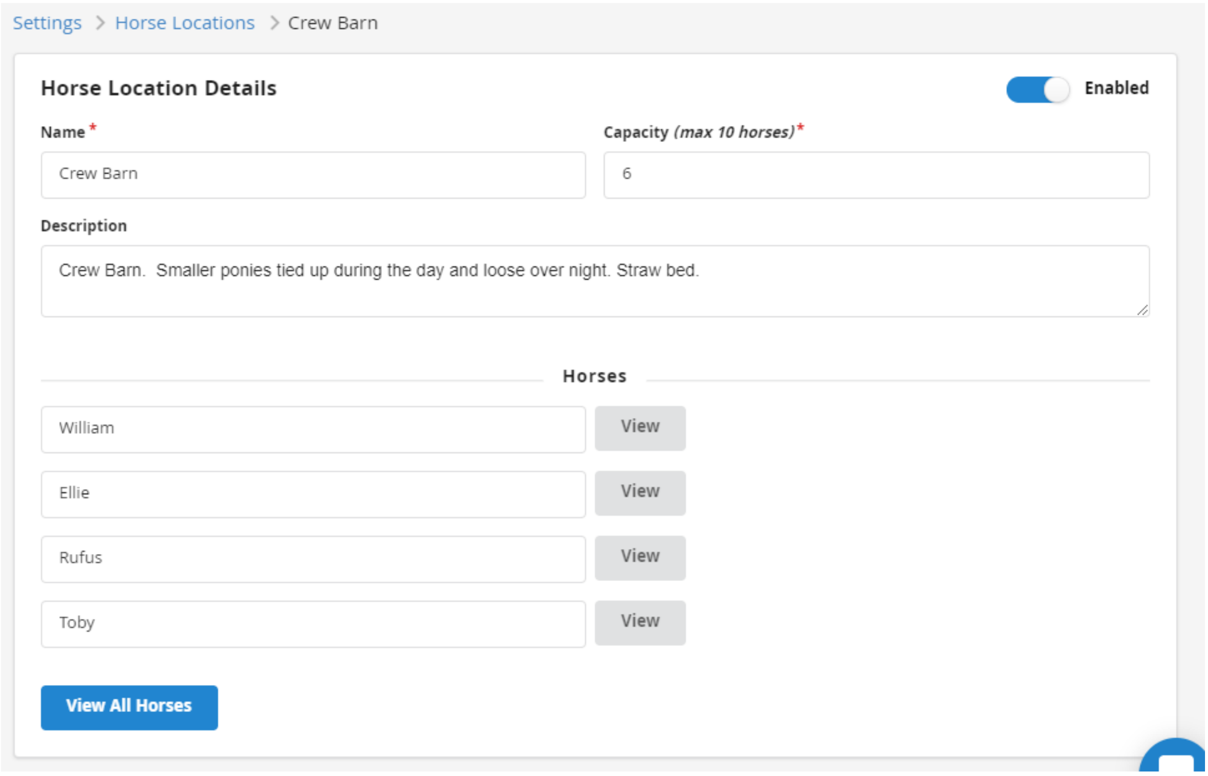


Larger organizations may have multiple barns, stables and paddocks where horses are kept meaning it is important to keep track of each horse’s location. You can do this by setting up your horse locations and then assign horses to a specific location, so they can easily be found.

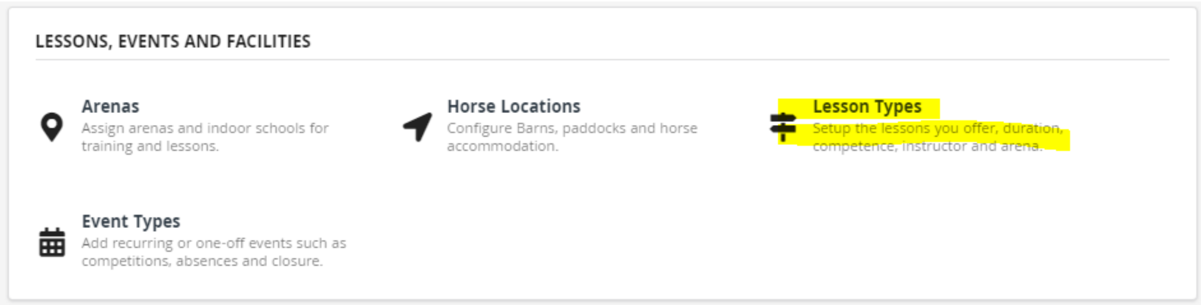
This is a straight-forward task. Click on the Horse Locations icon in settings then **Add** new or **Edit** existing locations.



Locations are free text so give them names that are meaningful to you and your staff and set their capacity so that they do not become overcrowded. You can check the horse locations panel for capacity prior to allocating new horses or moving existing. Clicking on **Edit** will also give you a view of which horses are allocated to a specific location as per screen below.



Creating and Configuring Lesson Types



Setting up Lesson Types is a key bit of configuration you'll want to get right – particularly if you offer riding lessons in any great number. Lesson types contains the following key information:

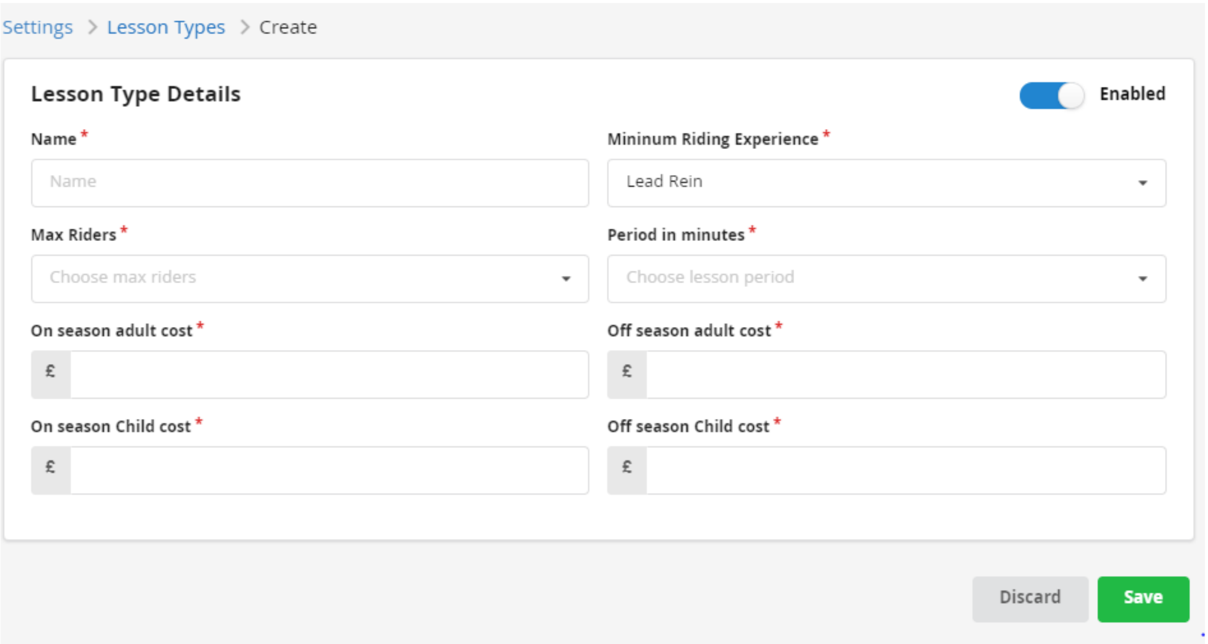
Name – Call it what you like but keep in short, meaningful and unique.

Minimum Riding Experience – ensure only suitably capable riders are permitted to ride in the lesson.

Max Riders – Controls the number of riders who can be allocated to this lesson.

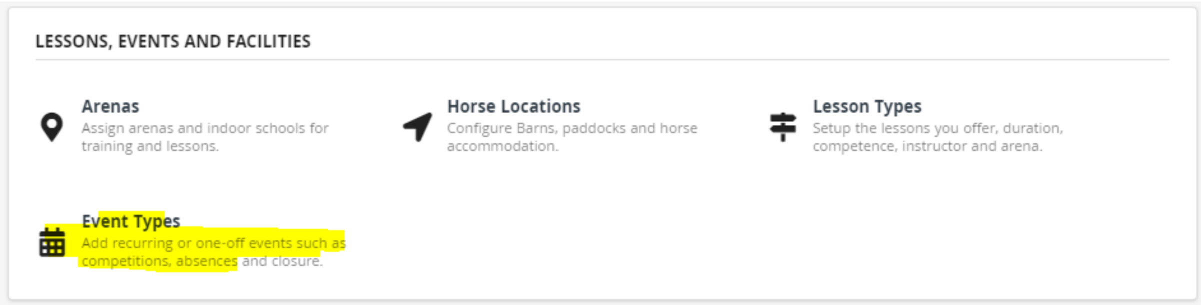
Period – What is the duration of this specific lesson.

On/off season costs – allows you to charge according to busy/slack periods age of rider.



Go ahead and setup your lesson types, ensuring you press Save after each lesson type added. Remember, lesson types can be **Enabled** or **Disabled** at will. **Lesson type are a pre-requisite to being able to schedule lessons and add riders.**

Creating and Configuring Event Types



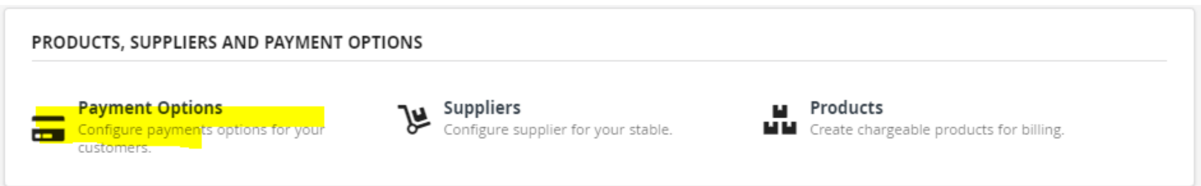
In StableMaster, events are considered one-off occurrences such as competitions, open days and absence. **It is important to understand that Events do not necessarily need to be related to horses or competitions for example. An event could be a member of staff going on holiday or a horse being laid off for rest and recuperation.**

For example, we create a new event whereby John is away for 2 weeks on holiday meaning he cannot be booked for instructor or task duties. We create the event, repeat it daily for the next fourteen days and simply allocate John to the event and hey presto – he becomes unavailable. Of course, you can setup horse related events also –we encourage you to explore the system and see that you can make it do.

Hint: Check the videos on our in-app Facebook feed for neat tricks on how to set staff absences.

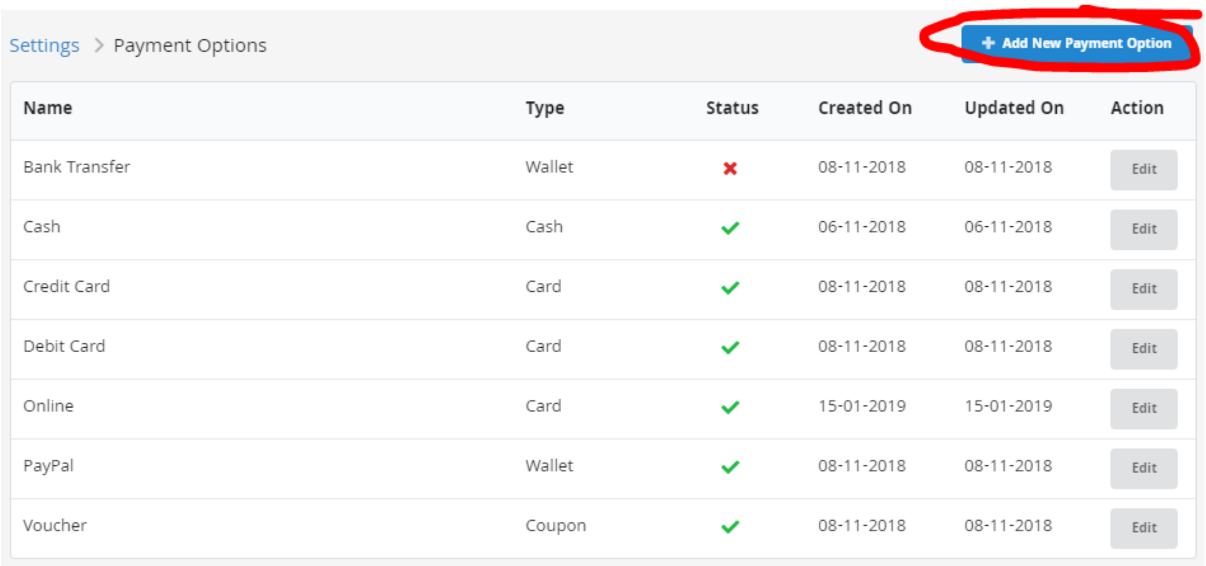
Now let's look at setting up Payment Options, Products and Suppliers.

Defining Payment Options



You define your payment options based on the way you currently take payment in your business, payment options typically include; Cash, Card, Voucher, Online, Bank Transfer for example.

To add a new payment option simply click on the **Add New Payment** button.

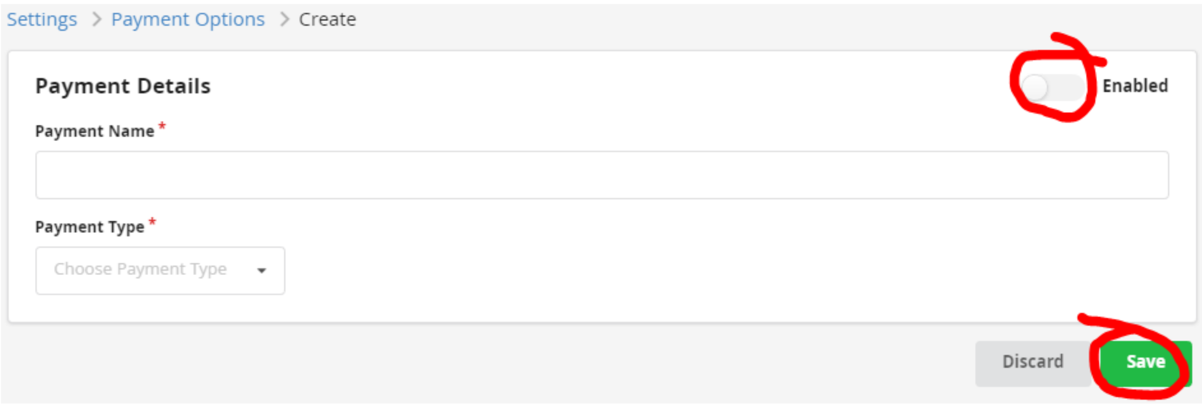


Settings > Payment Options

+ Add New Payment Option

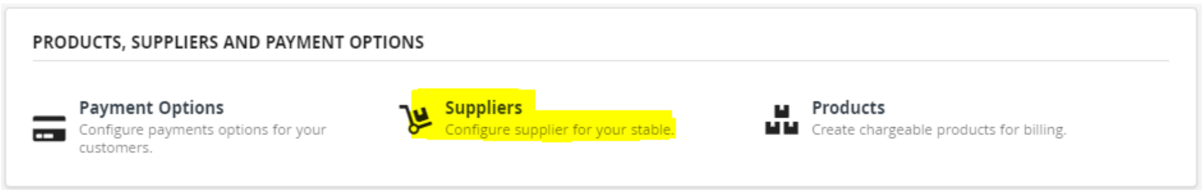
Name	Type	Status	Created On	Updated On	Action
Bank Transfer	Wallet	✖	08-11-2018	08-11-2018	Edit
Cash	Cash	✔	06-11-2018	06-11-2018	Edit
Credit Card	Card	✔	08-11-2018	08-11-2018	Edit
Debit Card	Card	✔	08-11-2018	08-11-2018	Edit
Online	Card	✔	15-01-2019	15-01-2019	Edit
PayPal	Wallet	✔	08-11-2018	08-11-2018	Edit
Voucher	Coupon	✔	08-11-2018	08-11-2018	Edit

And go ahead and complete the required fields, remembering to click on **Enable** and **Save** when complete.



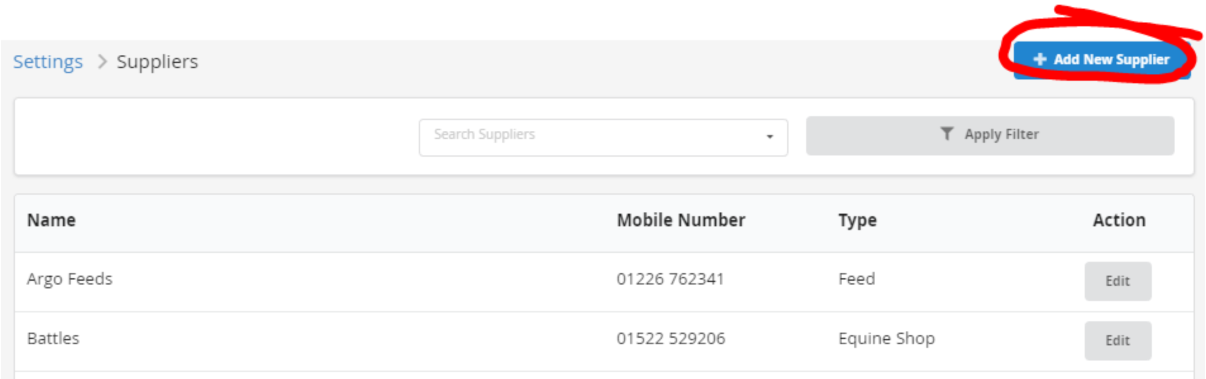
Once you have setup your payment types they become available when completing invoices. Now let's look at setting up Suppliers.

Adding Suppliers

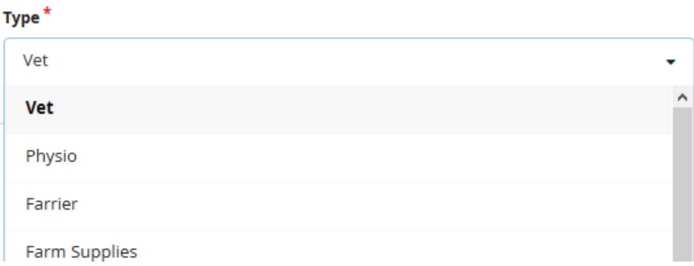


It is important to get all your different supplier types and associated suppliers setup in the system. Suppliers can come in many shapes and sizes; Farrier, Dental, Vet, Feed, Physio, Tack etc. Suppliers can be associated to tasks which in turn are entered as reminders in the calendar so that you know which supplier visit/delivery is due and someone is tasked to manage it. Of course, you also have all your supplier contact information in one place!

Adding suppliers is simple. To add one, simply click on the add new supplier button.



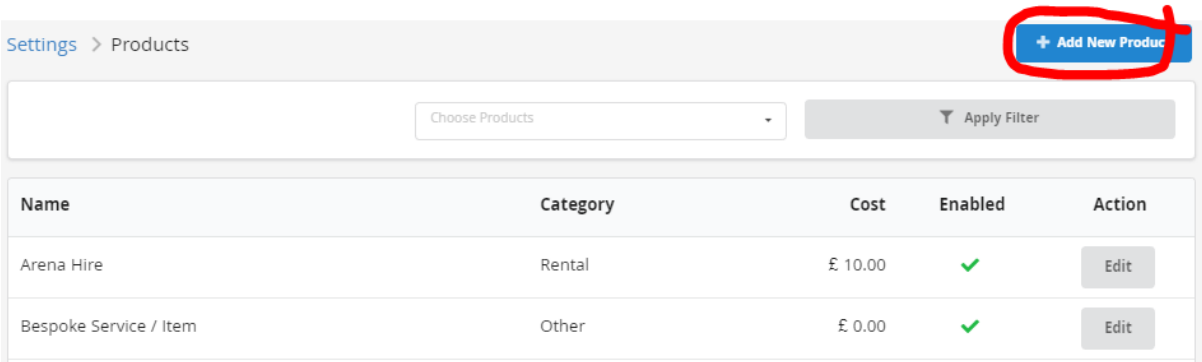
Then complete all their contact details ensuring you assign them a Supplier Type.



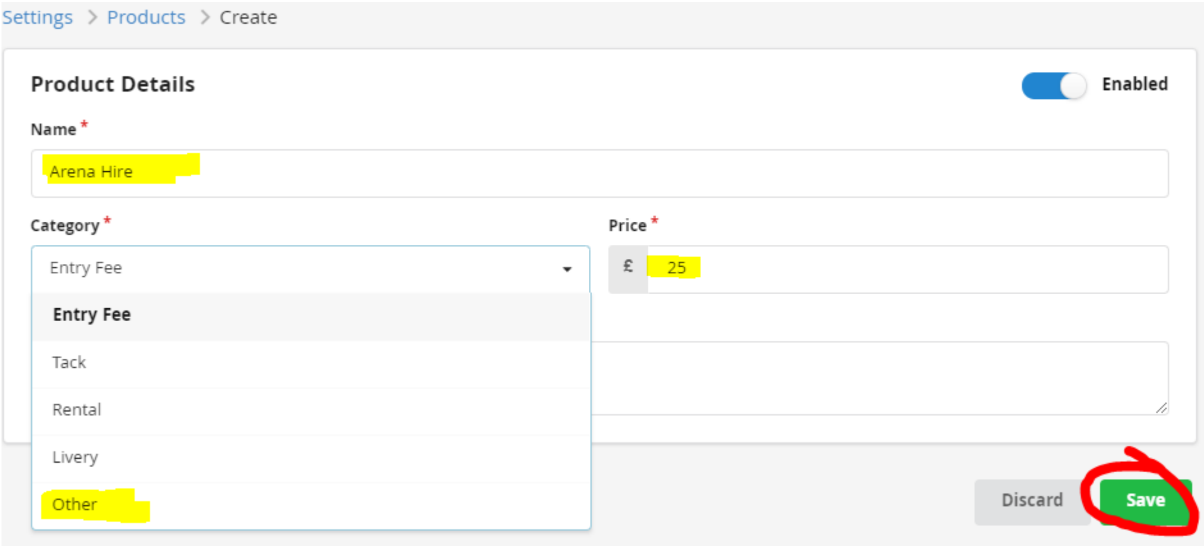
Creating Products

StableMaster allows you to create custom products for which you can then bill customers. For example, you could create a new product "Full Livery" and assign an associated cost to it – this then becomes a billable item that can be allocated to customer invoices. There is no limit on the types of custom product you can create. Other examples are; tack hire, packed lunch, creche etc. Products can be attached to the same invoices as lessons for example giving you powerful options for billing.

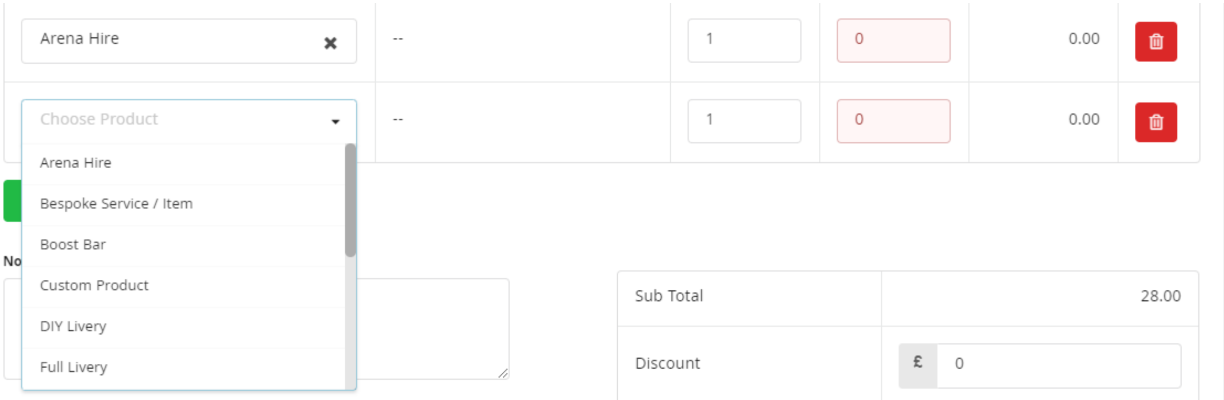
Adding products is simple and straight-forward, simply click on the **Add New Product** button



Then enter the following detail



Don't forget to click Save. This product will now appear on the invoice as an available option



Congratulations! That concludes the basic configuration of StableMaster. You are now ready to start adding customers, horses, scheduling lessons and creating tasks.

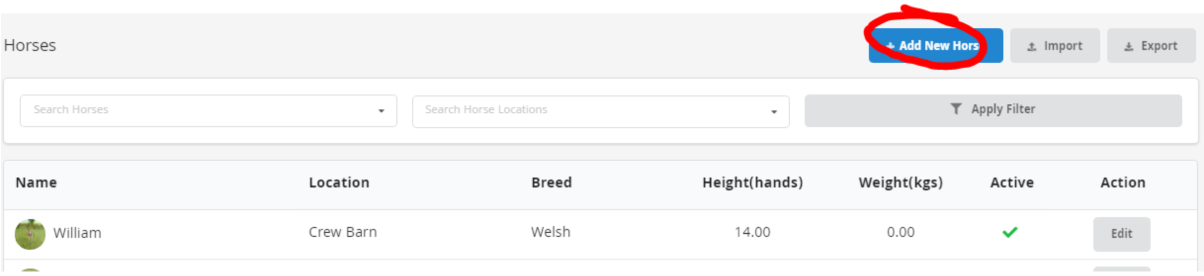
Adding Your Horse Data

Stablemaster allows two ways for you to get your horse data into the system; manually or by uploading a spreadsheet. We will examine both options in this section, starting with the manual method first.

Setting up your Horses Manually

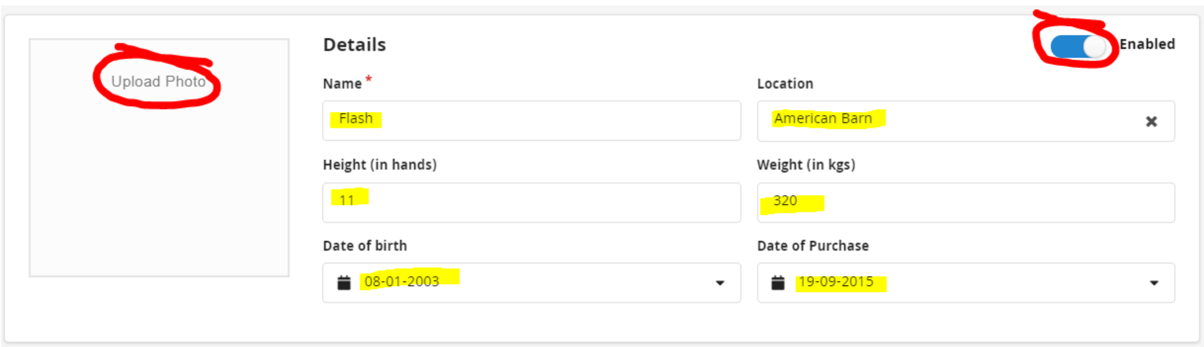
Adding horses manually is a piece of cake. Click on the **Horses** icon from the main menu bar to the right of the screen. You will be presented with your list of existing horses.

Simply click the **Add New Horse** button to proceed.

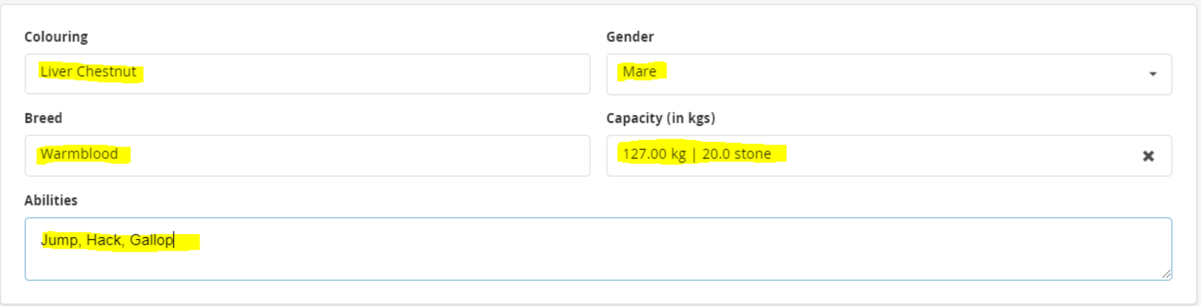


You can record a lot of rich information relating to each horse in StableMaster. We recommend you enter your horse records as fully as possible and use the document upload function to store records such as assessments, passports etc. in one central place.

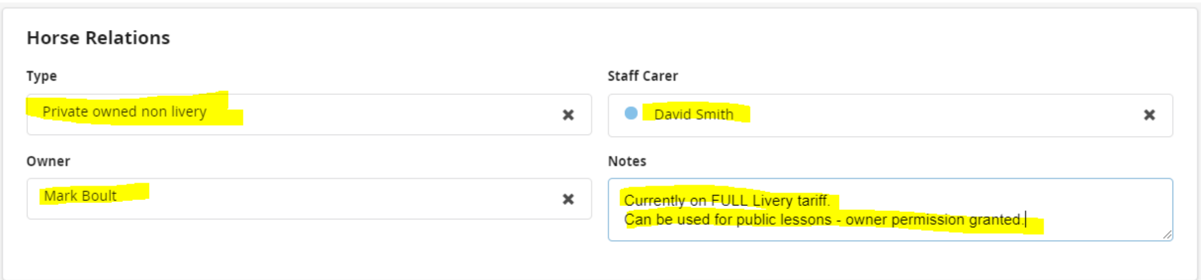
Let’s go ahead and enter our horse data as per the example below.



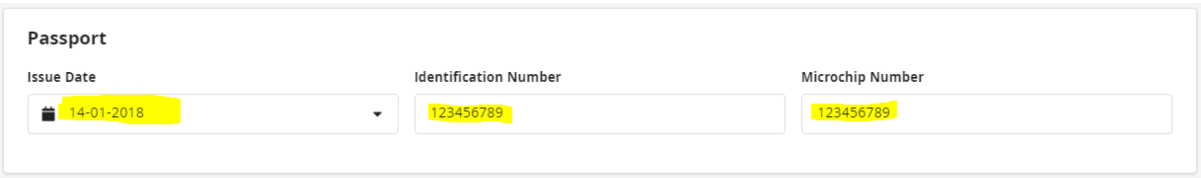
The **Enabled** button is important, if it is not set the horse will not be visible for task and lesson assignment. Horse **Location** is defined in the settings area (check the earlier section on how to these up).



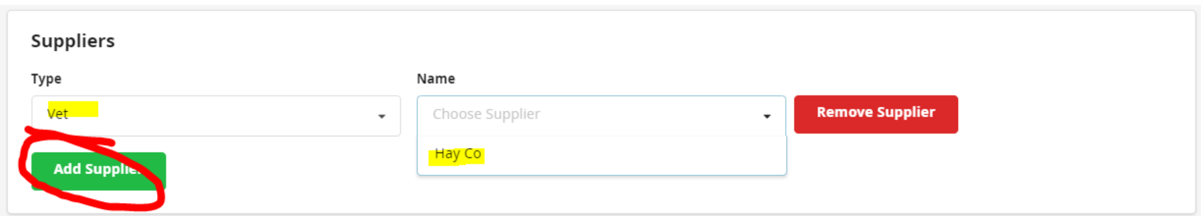
Provide further detail on the specific horse. **Capacity** is important when allocating this horse to specific riders – you don't want to overstretch your horse or create an unsafe situation. Similarly, the **Abilities** section helps ensure only horses with specific capability are assigned to lessons where these capabilities are required; jumping for example.



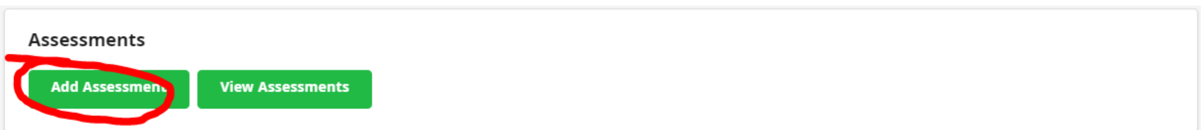
The Horse Relations section determines the horse usage in the stable and who the primary staff contact for the horse is along with owner and any special notes relating to the horse.



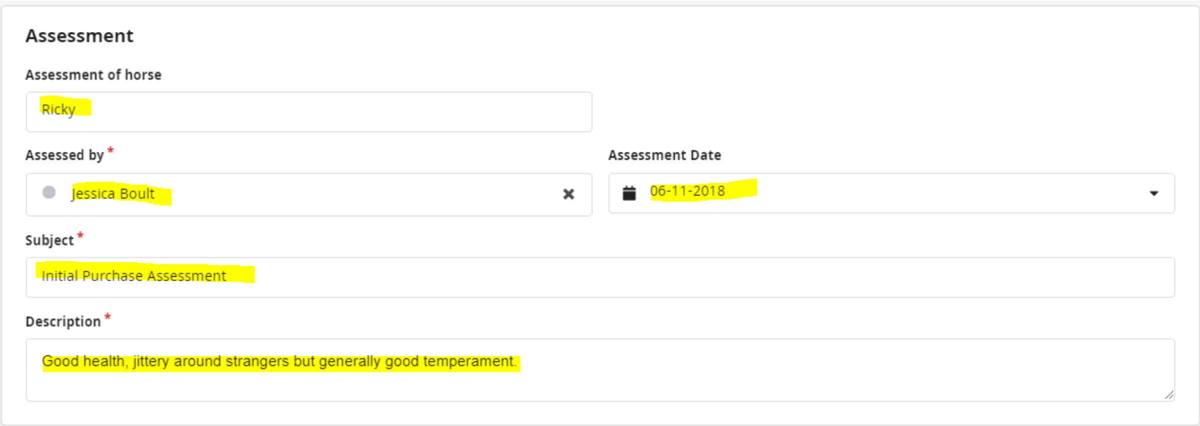
Go ahead and enter Horse Passport and microchip information.



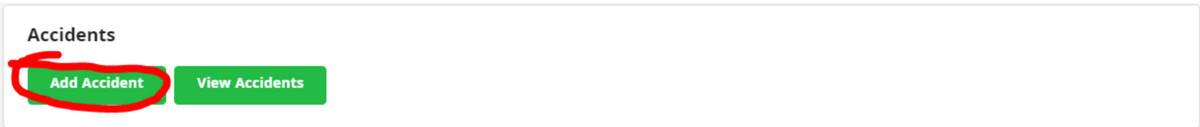
Some horses will have specific suppliers for example for feed and veterinary. Assign these suppliers to allow staff to order the right feed from the right supplier. Also, maintain a central view of who provides care and supplies for each specific horse. Annotate tasks with the supplier details to ensure horses are covered comprehensively.



It is important to maintain an initial and ongoing record of assessment for your horses to track health, behavior and vaccination. StableMaster allows this. Click in the **Add Assessment** button and go ahead and add your initial assessment as per example below.

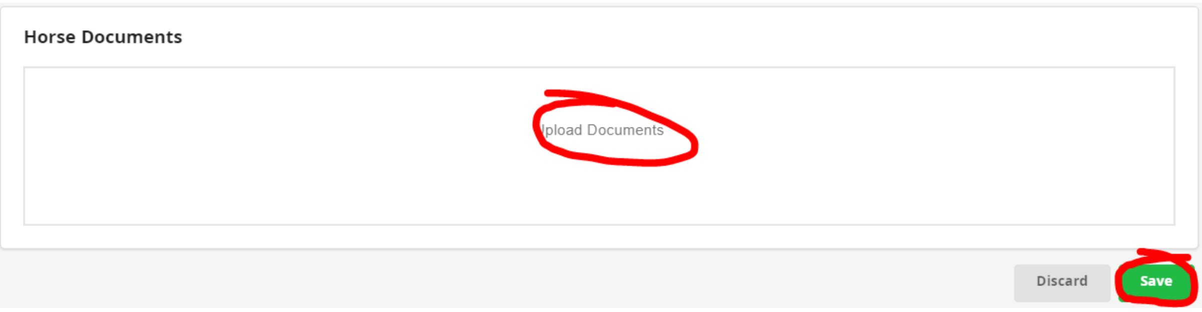


Similarly, you will want an ongoing record of any accidents the horse may have been involved in.



The accident report form is comprehensive. Of course, not all accidents involve horses and there is a separate accident form for customers and staff. You should try to include as much detail in the accident report form to ensure you are covered and that lessons can be learned.

Finally, you can upload important horse related documents to StableMaster to help you keep all your important records in place. There are no restrictions on file types; Microsoft Word, Adobe PDF, JPEG, Excel etc. Useful to store passports, vet reports, receipts for sale.

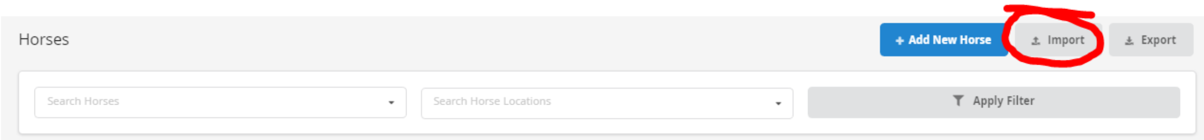


And that's it, you have entered your first horse record – don't forget to press **Save** now and every time you update a horse record.

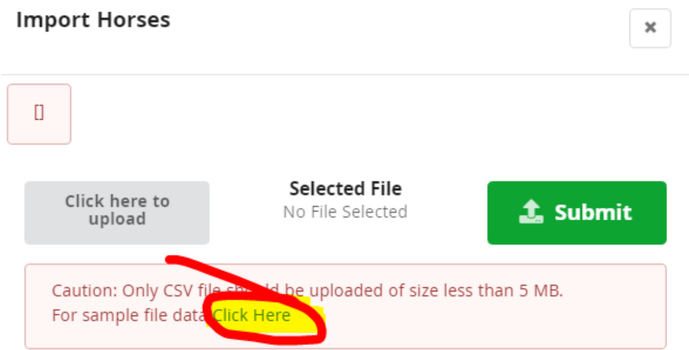
Adding your Horses using the Data Upload

To make it easy for you to take on StableMaster we have provided a data upload tool which allows you to populate a template and then load this directly meaning you don't have to add your horses individually. To access this tool, click on the Horse menu icon.

Then click on the Import button

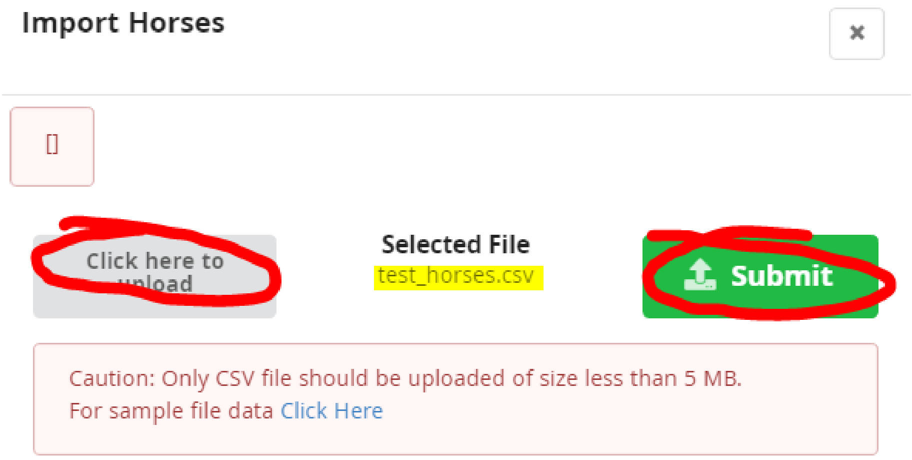


The following screen will appear.



To download the template, click on the "Click here" link above. This will download a blank template ready for you to input your data. Input your data directly into the spreadsheet template, then save when ready. **Note you must save your data as a CSV (MS-DOS) format files, as per below.**

Now you have saved your data you need to upload it to StableMaster. This is simple. Click the upload button below, browse to where you saved your data and select it then click Submit.



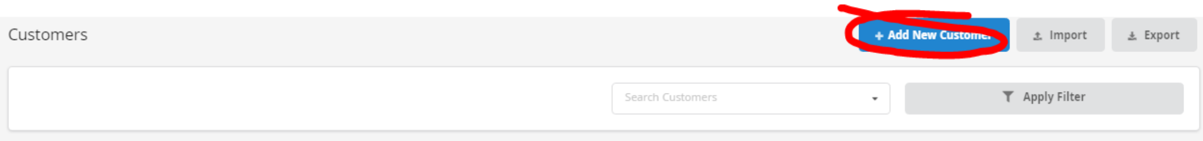
After a short delay, your horse data will appear in your horse list. If you have any problems in this process, then contact the StableMaster team via the usual routes.

Adding Customer Data

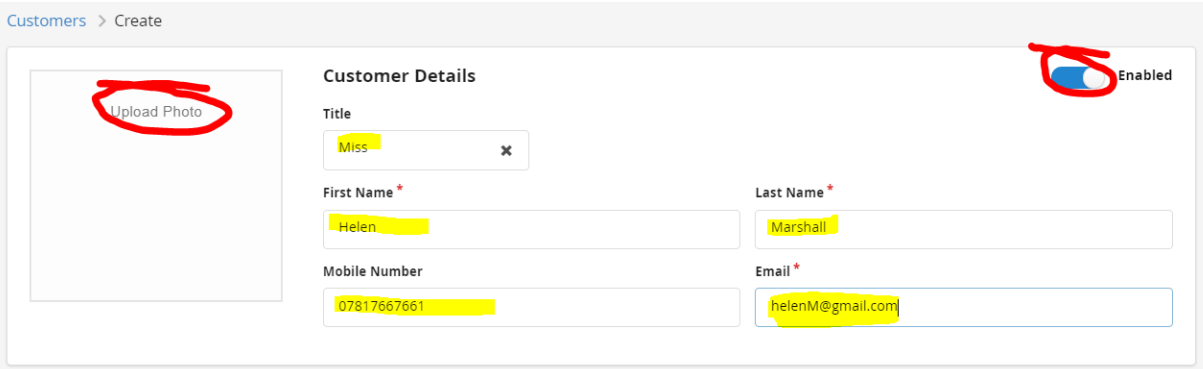
As with entering horse data there are two options for entering your customer data; manually and via the data upload. The next section takes you through both options starting with the manual approach.

From the main StableMaster menu on the left of the screen, click in the **Customers** button.

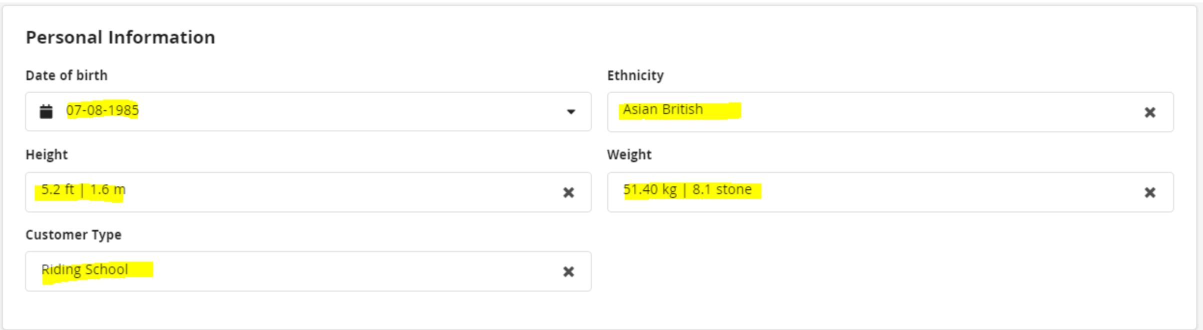
This will display a list of your existing customers. To add   a customer simply click in the **Add New Customer** button.



Go ahead and enter basic information relating to the customer and if possible upload a photograph, trying to ensure you complete as much detail as possible.

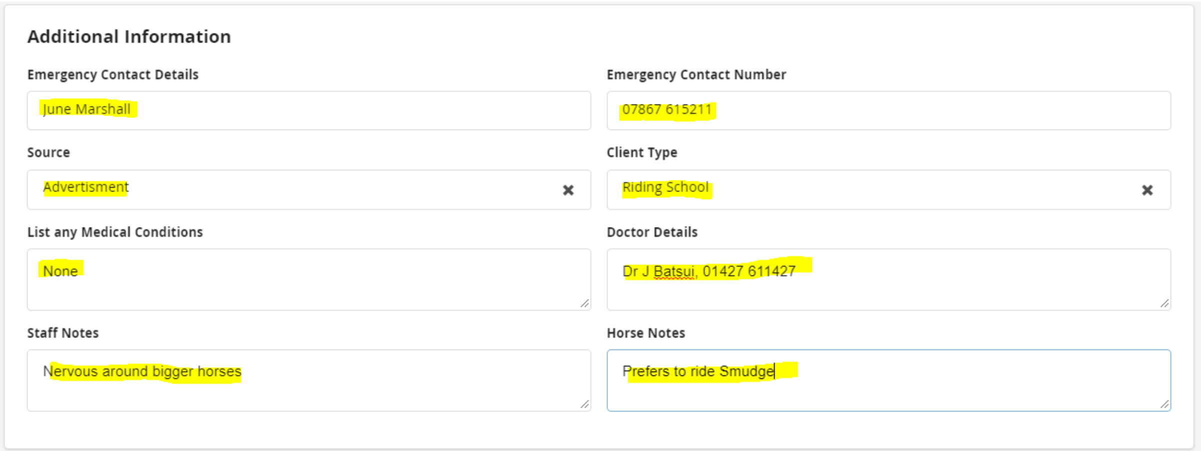


Note the **Enable** button, this should be switch on to ensure the customer can be added to lessons etc. E



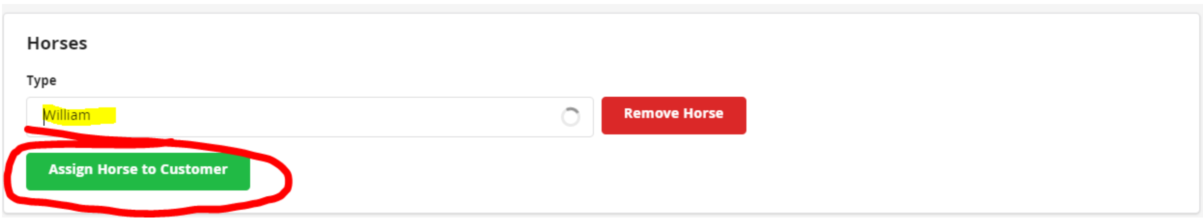
Continue to enter as much information in each of the fields.

Paying attention to the additional details which include emergency contact information and medical conditions, as per example below.



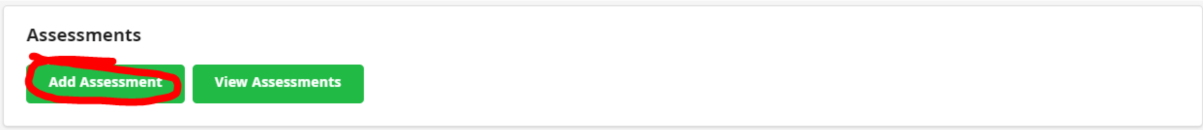
You have now completed the basic customer setup. Whilst you access the customer record you also have the option to add assign horses, add assessments, create accident reports and add/withdraw funds from the customers Wallet Balance. The next sections

You can assign horses to customers for billing purposes and to ensure your horses remain traceable. Simply click on the **Assign Horses** button and select the horse from the drop-down.

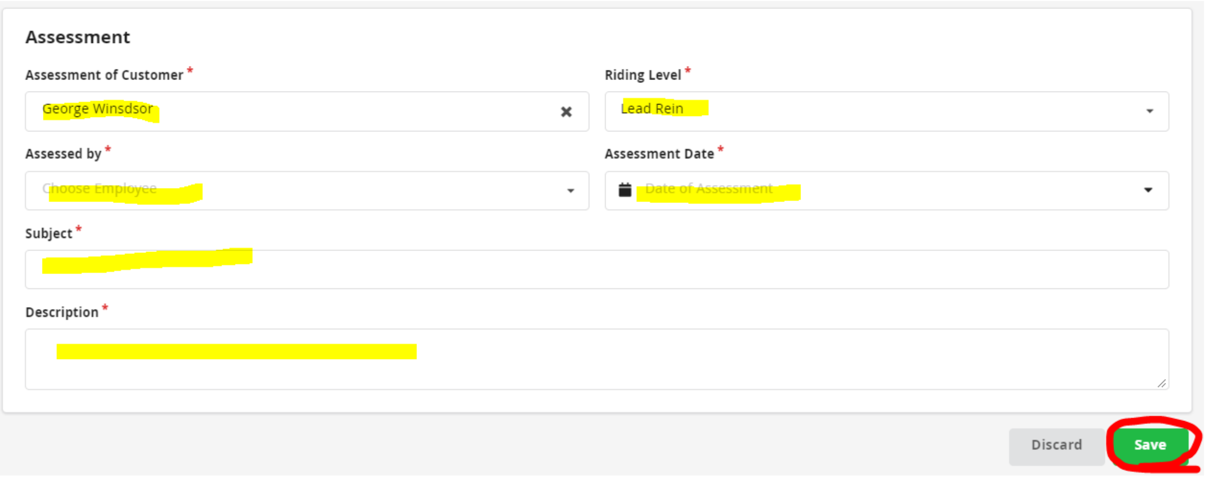


Customer Assessment Record

It is essential to ensure you record the current riding competency for each customer to avoid safety issues. StableMaster allows you to maintain assessment logs so you can review and re-assess customers and track their progression.   To add an assessment simply go to the customers record and find the **Add Assessment** button.



Then add all the relevant detail. If your assessment includes progress the customers riding experience, then ensure you reflect this by updating the **Riding Level** field.

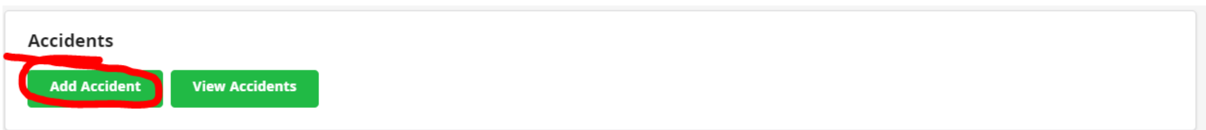


Hint: Always maintain accurate Riding Levels for you customers to avoid them being allocated lessons that are beyond their capability.

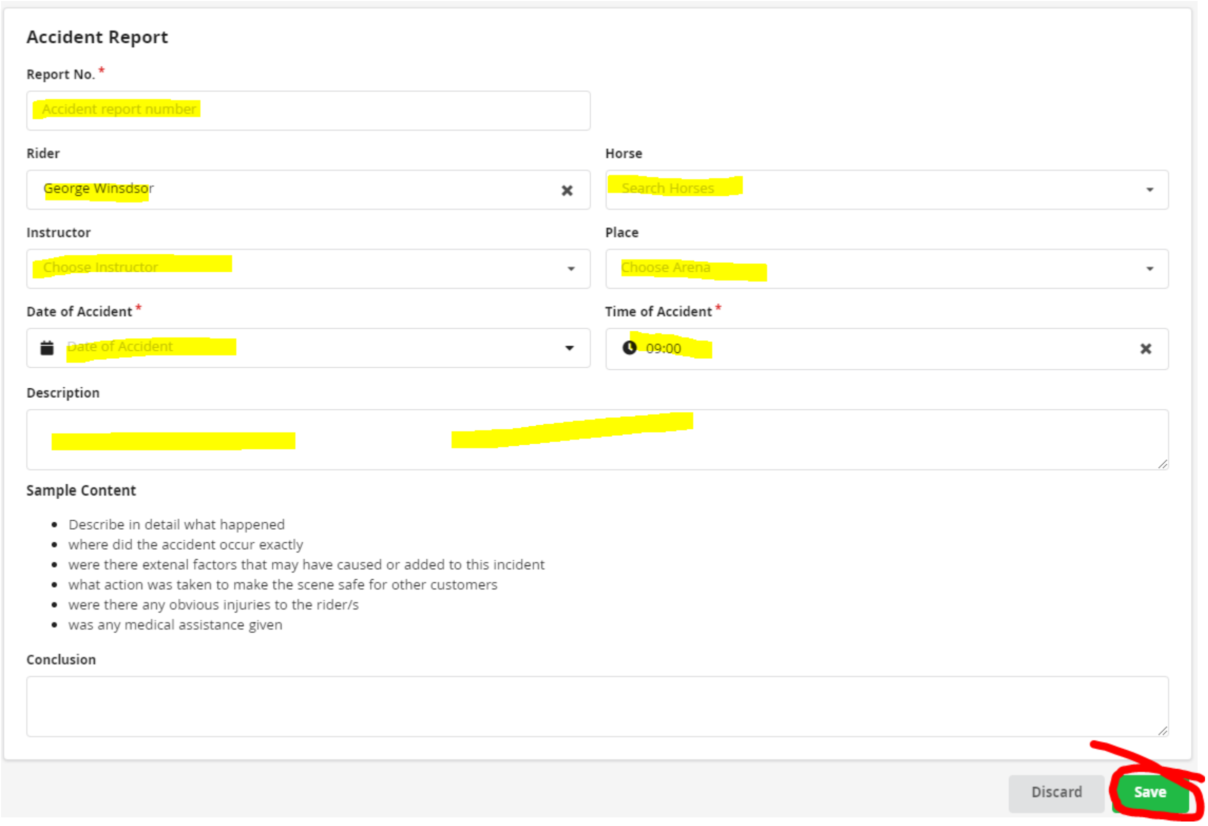
Accident Reports

Accidents happen, right. StableMaster has a comprehensive accident report form which can be accessed from the customer record, and which maintains a record of all accidents in the stable.

Creating a new accident report is straight-forward. Navigate to the record of the customer involved and scroll down to the **Add Accident Report** button.



Click on the button and complete the form as fully as possible. Remember accidents can happen anywhere and can involve customers, staff, horses or none of the above. The key thing is to maintain an auditable record of all accidents in your organization and to review these frequently to learn lessons and minimize the risk of them re-occurring.

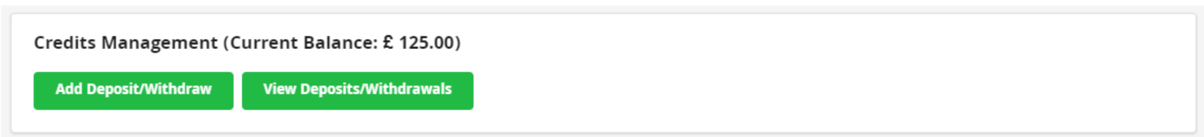


Customer Wallet

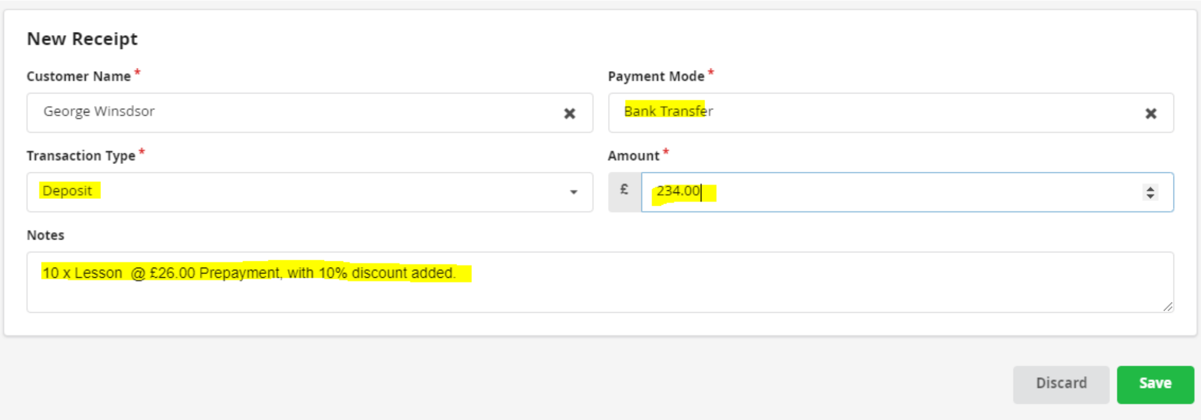
The Customer Wallet allows customers to pre-pay for lessons, products and services and subsequently be billed via the wallet when raising an invoice. In StableMaster there is no limit to the amount the customer can pre-pay and you configure the payment options in the Payment Types in the Settings screen.

Each customer has a wallet by default and their balance is set to zero until a payment (credit) is made to their account. All transactions (in and out) are audited in the system so that the Finance manager can have a clear view of who made which transaction.

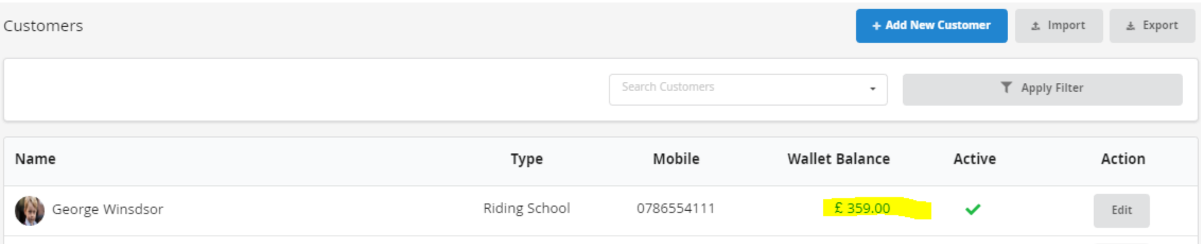
To access a customer's Wallet simply go to the customer record and scroll down to the **Credits Management** section.



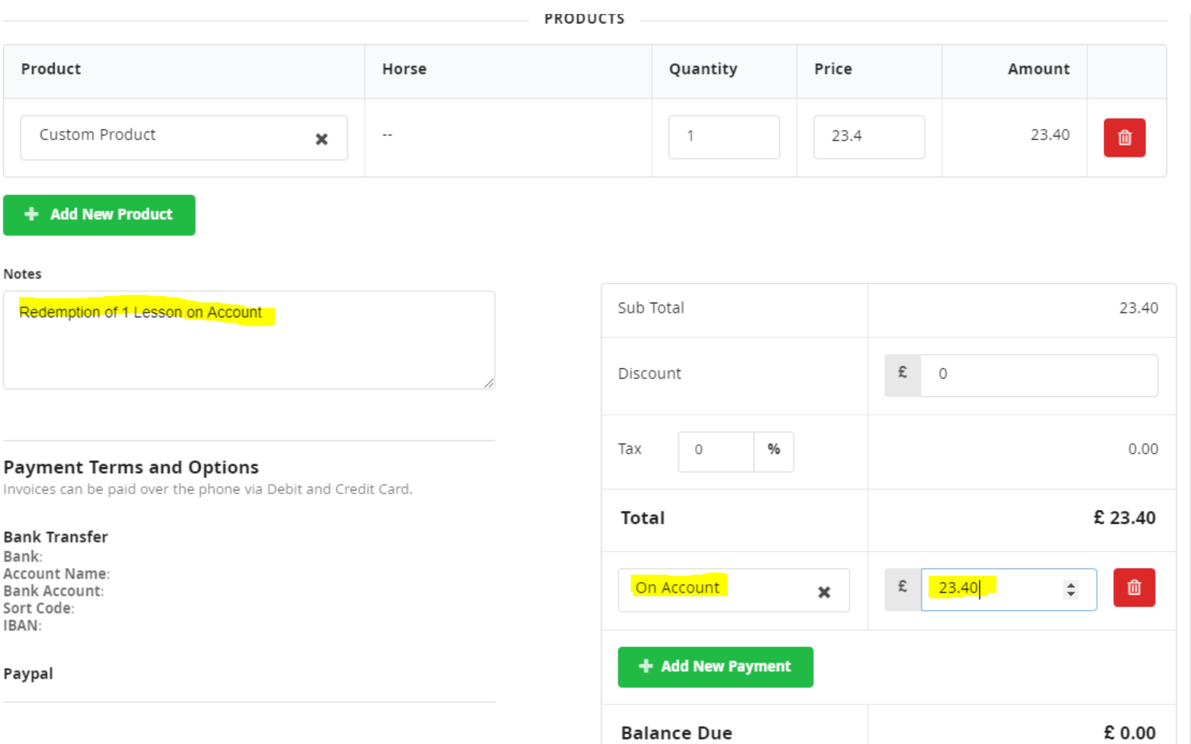
Here you can see a summary of the current balance for George. You can now add or withdraw funds as well as see a history of transactions. In the example below, we have added a prepayment for 10 lessons for the George and applied a ten percent bulk discount.



Once we Save this transaction, we can see George's Wallet balance has registered the correct deposit in his overall balance.



When we raise an invoice against George for one lesson we can use his Wallet Balance as a form of payment.



Scheduling a Lesson and Repeating

Lessons are easy to setup and schedule in StableMaster. Lessons can be one-off or set to repeat, and you can carry forward riders, horses, instructors and arenas. Additionally, you can bill customers for lessons attended.

A typical lesson consists of:

- Lesson Name
- An assigned Lesson Type
- A date and a start/finish time
- Lesson cost
- Lesson Riding Level (what required skill is required)
- Maximum Riders
- An Instructor
- A location (i.e. an Arena or course)
- Assigned Horses
- Assigned riders (customers)

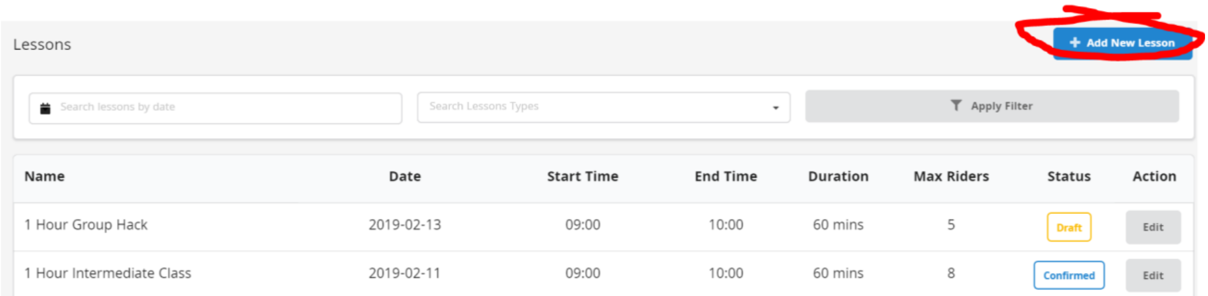
Prior to adding lessons, you must setup your lessons types (see previous section), as well as have your customers, horses, staff and arenas input. The above areas in **BOLD** are allocated when you setup a new Lesson Type – see earlier section in creating Lesson Types for more detail.

So, before you can add instructors and horses etc. to a lesson you need to have setup a corresponding lesson type.

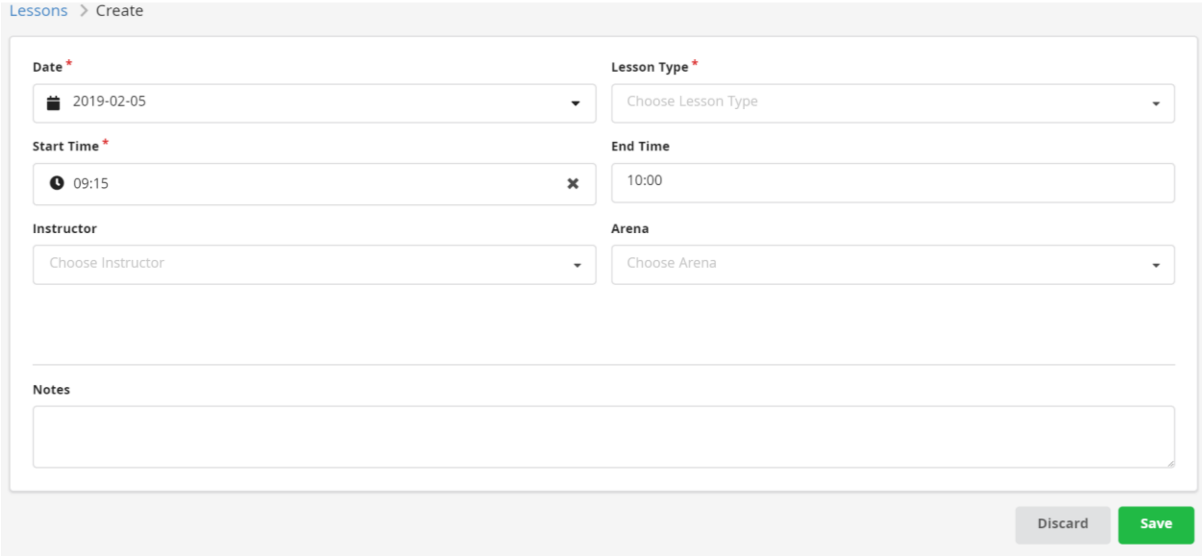
OK, let's assume you have setup a few lesson types and are now ready to schedule a lesson and add customers, horses etc.

To schedule a new lesson simply click on the **Lessons** icon on the main menu to the left. The following screen will appear.

Lessons



As you can see there are several lessons already setup in our demo system, you however will have no lessons configured at this point. Now click on the **Add New Lesson** button highlighted.

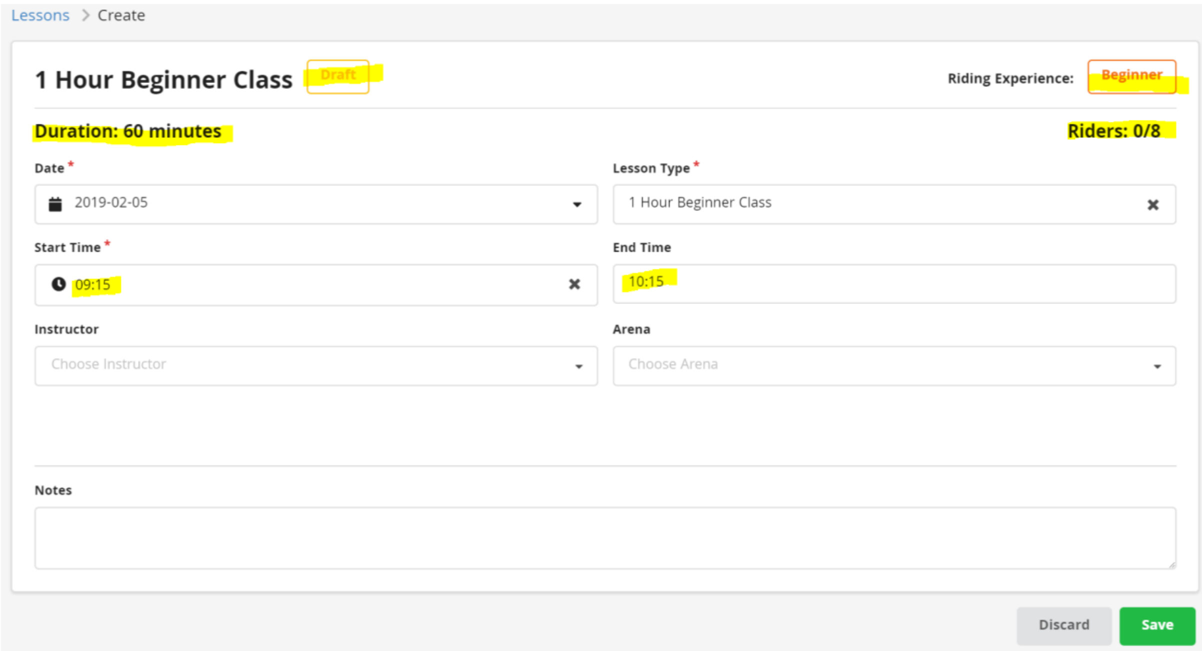


Once you click to create a new lesson you will get something which resembles the screen above.

First this to do is to assign a lesson date.

Then click the Lesson Type drop down and select a lesson type. **Note - If this dropdown is empty then you haven't setup any lesson types – check earlier section on how to do this.**

Once you select a Lesson Type from the dropdown some key information relating to the lesson type selected is automatically pulled through to the screen. These are highlighted below.



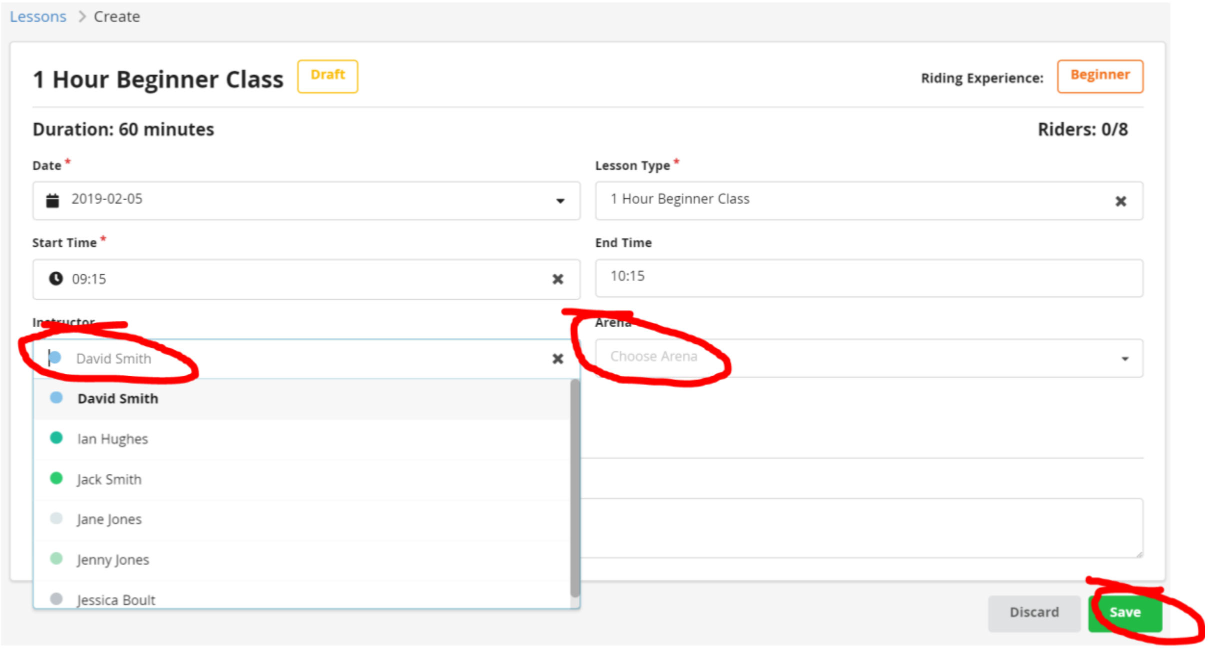
There are a few key things to recognize and I will walk you through these now.

Working from the top you can see that the Lessons Name has been populated **1 Hour Beginner Class –** this is derived from the Lesson type you selected. You can see it is in **Draft** state. At this point the lesson has not been written to the calendar because we are still waiting for further information. You can also see that the **Riding Experience** has been set to **Beginner**. Again, this is defined by the lesson type you selected, therefore no rider with experience below Beginner should be allocated to this lesson.

You will also see that the **Lesson Duration** has been set to **60 mins** – again defined by the way you set this lesson up in Lesson Types. The maximum number of riders for this lesson is set to 8, this is defined in the lesson type and can be altered there should it need to be.

The Start Time and End time can be modified by you in this screen, but the duration cannot. You musty alter the duration by editing the lesson type via settings.

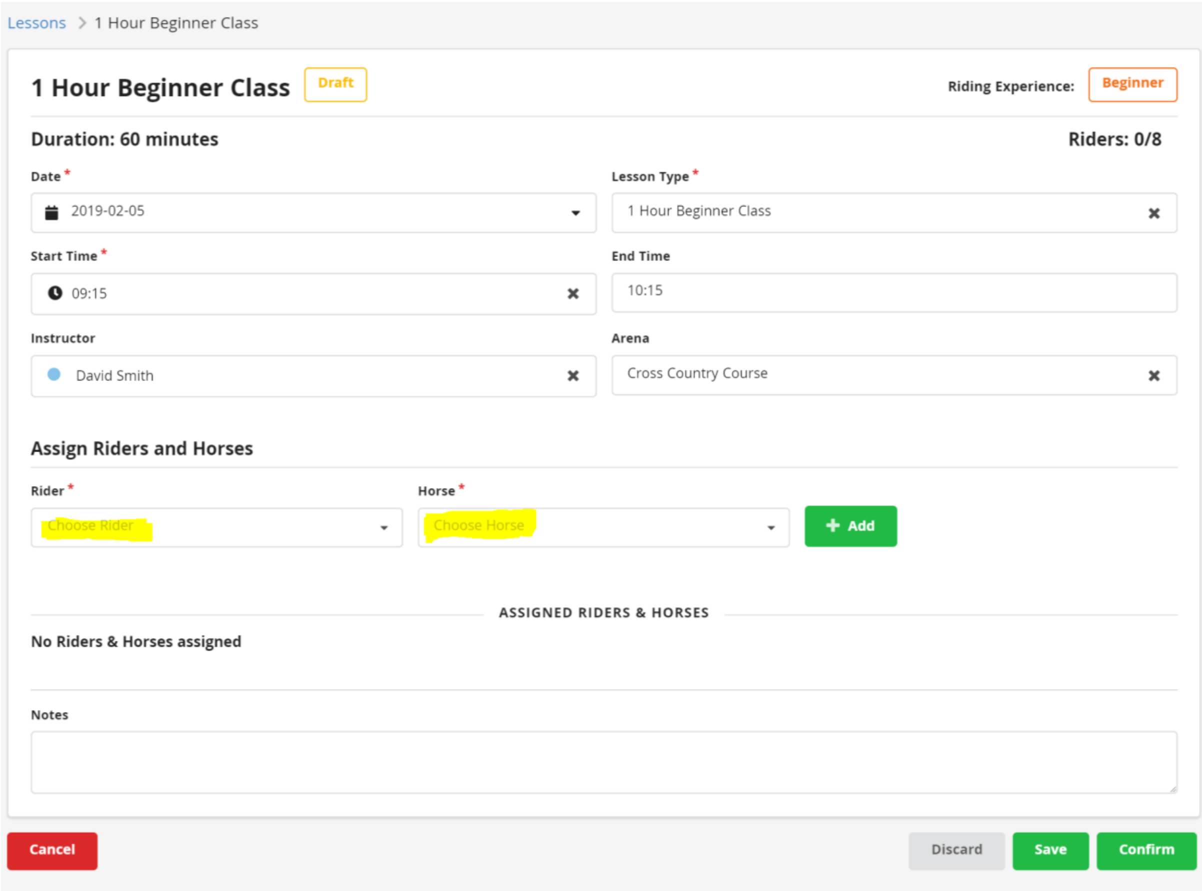
Ok, now that's clear lets go ahead and add further information, starting by adding an instructor and a lesson arena.



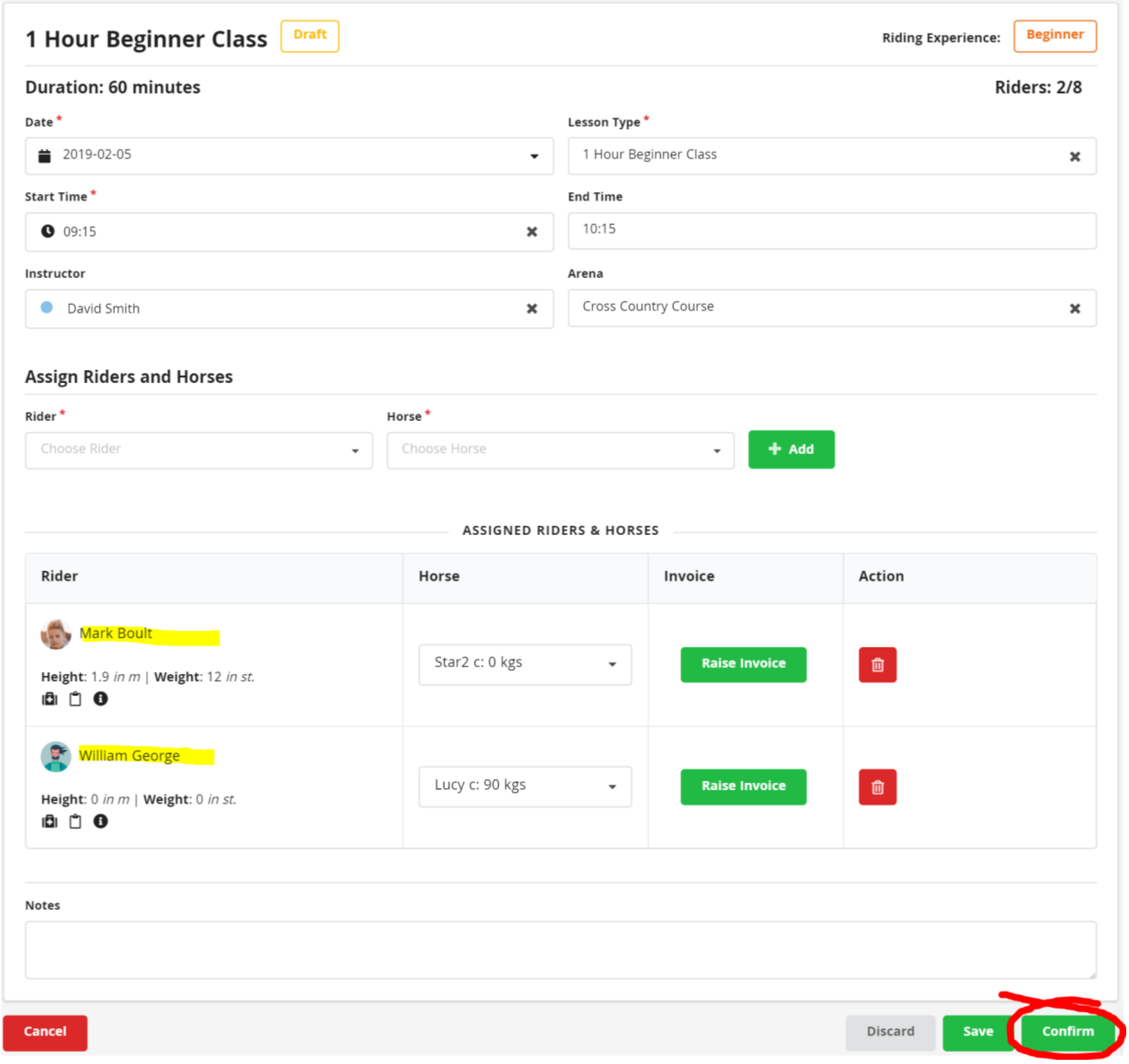
Use the dropdown menus to assign Instructor and Arena. If these are empty, you haven't set them up so please refer to the earlier sections of this document on how to do this.

Note - only Instructors and Arenas that are available will be selectable. This means that if an instructor or arena is already allocated to another lesson or event at the same time on the same day, they will not appear in the drop-down lists. Ok, go ahead and assign an instructor and an arena and add any lesson notes, then click **Save.**

Great. Next, we need to allocated riders and horses to this lesson. When you click Save, further options are revealed as per screen below.

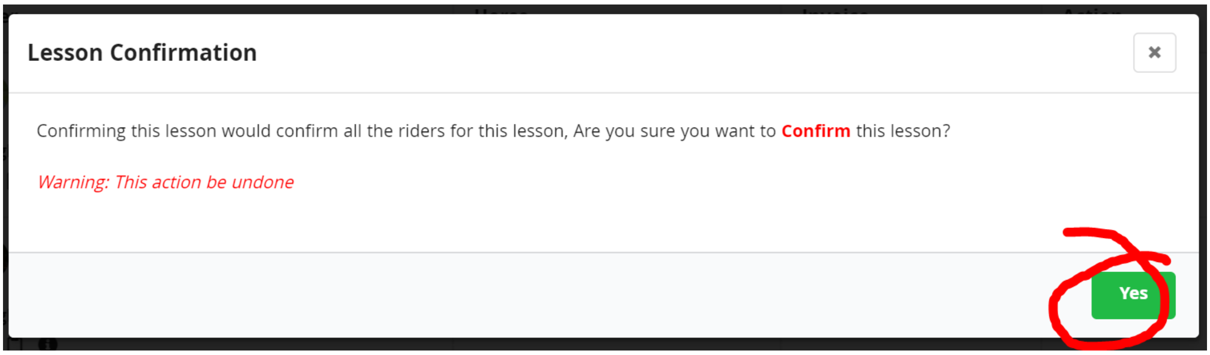


You can see that we now have the option to **Assign Riders and Horses.** Riders and horses who are available (i.e. not already booked onto a different lesson on the same day at the same time) will be available for assignment via the drop-down lists. Think carefully about which riders you assign to which horse. Select a combination then simply click the **+Add** button. In the example below I have added two riders to this lesson.



You can go ahead and allocated as many riders as you wish up to the predefined limit for this lesson type. To remove them just click on the Red Trash icon to the right. Once you have added all your riders, you need to **move the lesson from Draft state to Confirmed.** To do this click the Confirm button to the bottom right.

This now locks the lesson into the Calendar as a one-time occurrence.

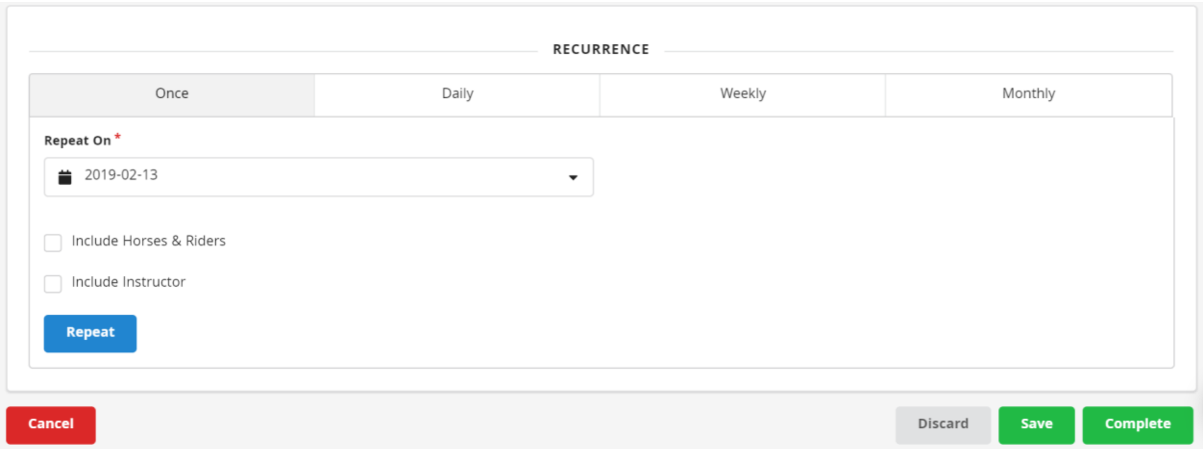


Click **Yes** to confirm the lesson. At this point you may want to set the lesson to repeat.

Hint: Only confirmed lessons or assigned tasks can be then set to repeat.

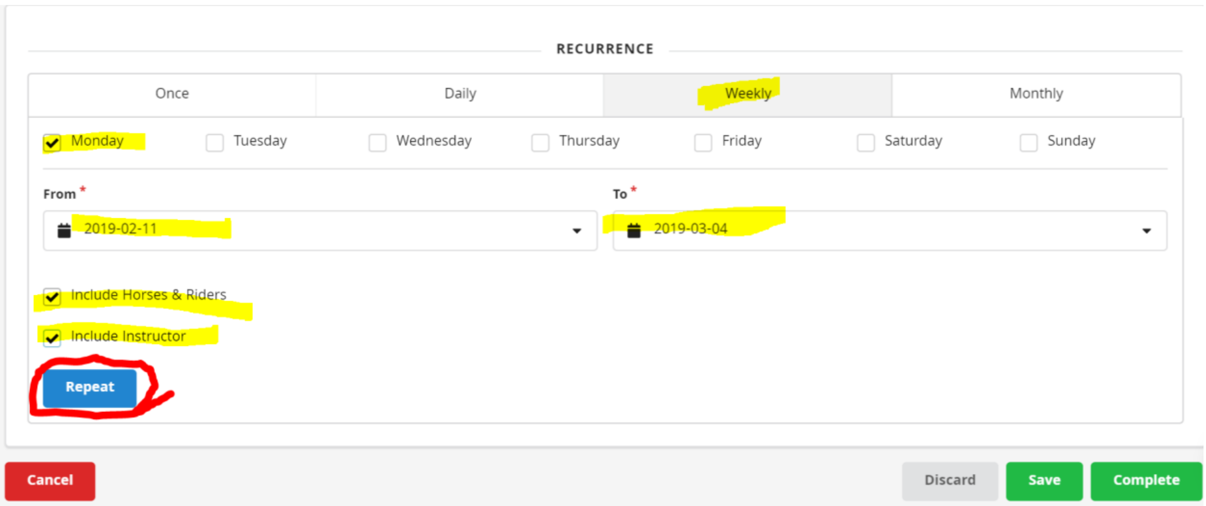
When you have confirmed the lesson, this locks out the assigned instructor, riders, horses and arena so it cannot be double-booked for the same date and time.

Confirming the Lesson gives you access to additional features which allow you to set the lesson to repeat. The Recurrence options below should now appear.



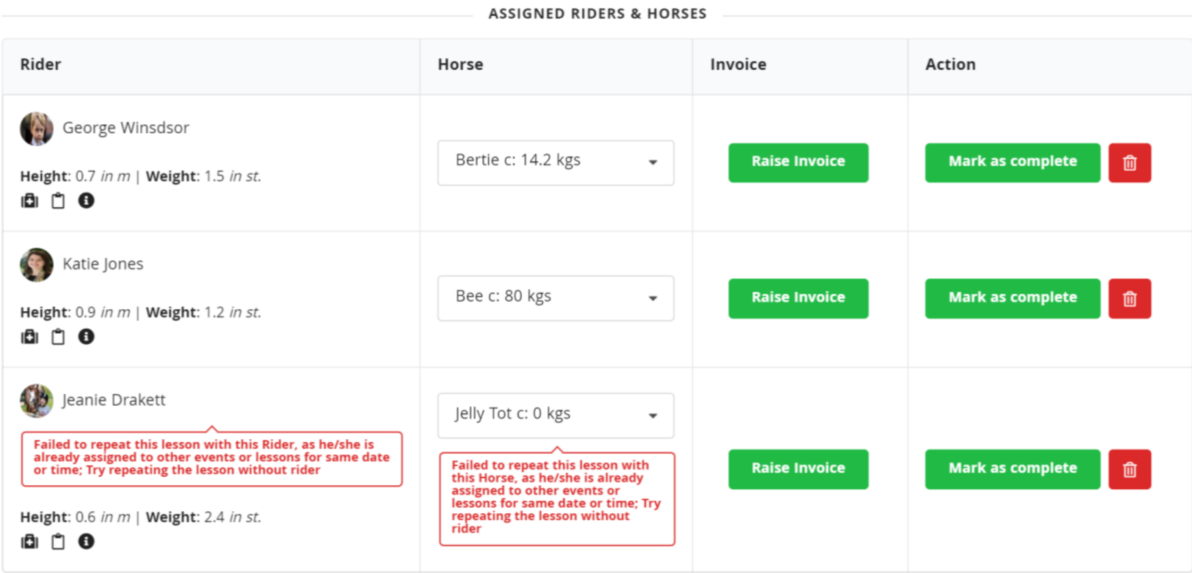
Lessons can be repeated daily, weekly or monthly and you can choose to carry forward riders, horses and instructors, but don't worry – you can edit each lesson occurrence to add or remove customers and re-assign horses if you wish.

Let's assume you wish to repeat this lesson on a weekly basis. As per the screen below, firstly, click on the Weekly Tab, then select the day of the week this lesson will repeat on. Then set the repeat start and end dates and confirm via the check boxes whether you want to carry forward instructors, riders and horses.



Then simply click the **Repeat** button to write these repeat lessons to the Calendar. Voila! All done, go ahead and check the Calendar view to see these lessons have been registered.

You may get an error indicating riders or horses are already allocated like the one below.



This is to be expected – you have attempted to double book either a rider or a horse or both in the example above. There are no limitations as to how many times you can repeat a lesson.

Billing for Lessons and Products

Of course, you will need to be able to bill for lessons, products and services. Lessons we have discussed, but now let's look at overall billing. In this example we will run through billing a customer for a lesson and some addition products purchased as part of the lesson.

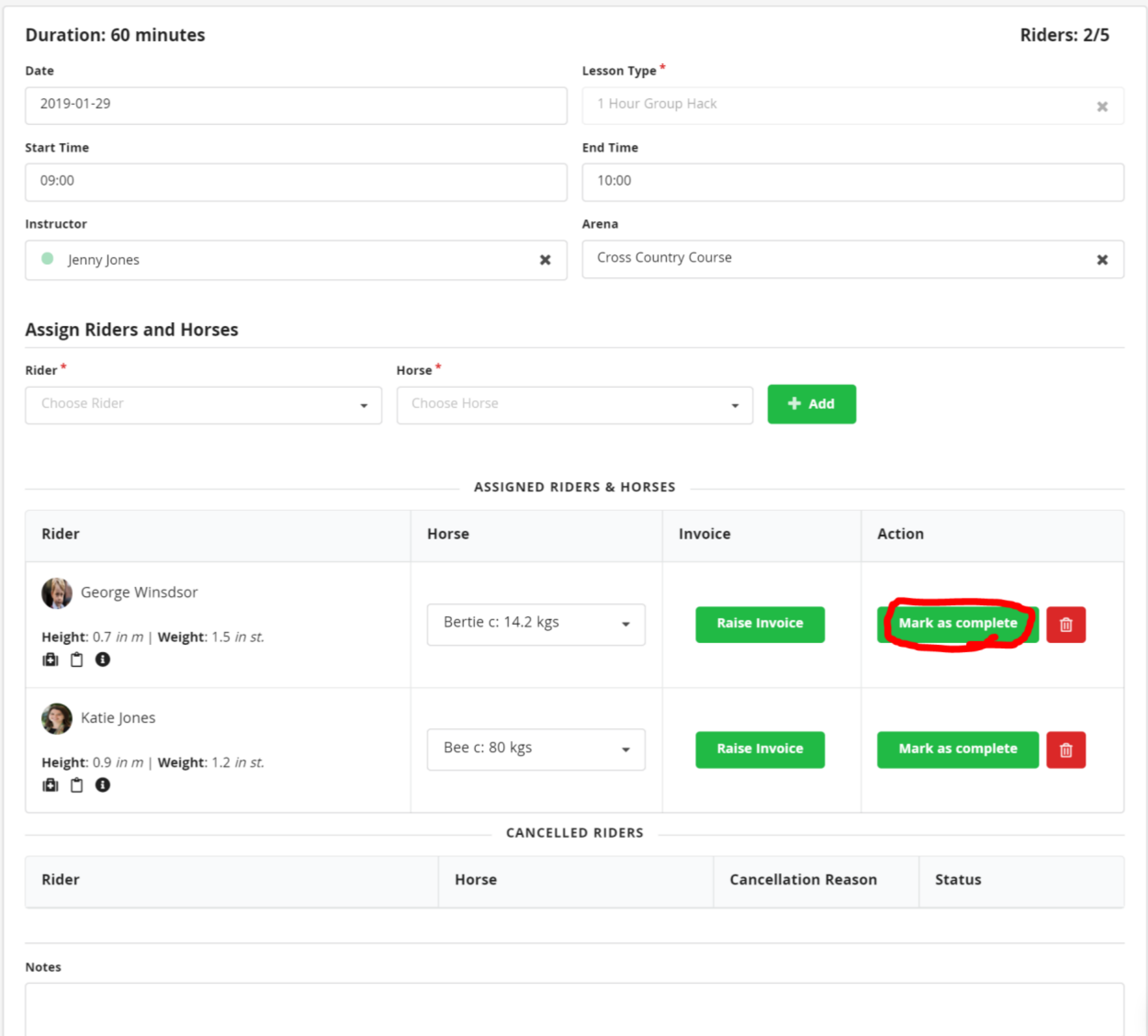
Pre-requisites to being able to bill for anything are as follows:

- Your account settings (bank details etc.) must have been configured.
- You must have some customers on the system
- You must have some lesson types configured
- You must have customers assigned to lessons
- You must have some products configured
- Payment Types must be setup

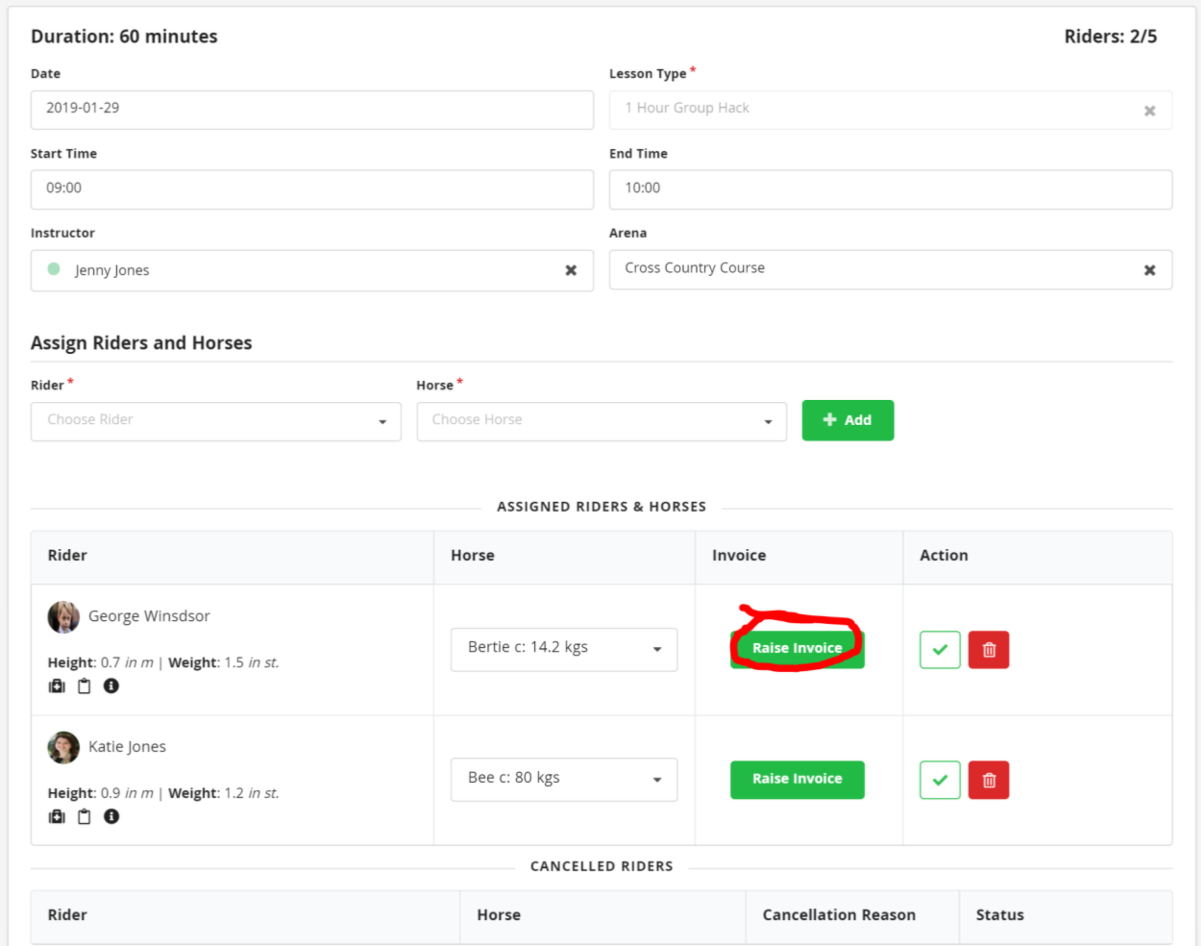
Check the earlier chapters in this document for guidance on how to do the above. Invoices can be raised by any user of the system. So you have an audit, StableMaster records all transactions in the system including who raised the invoice and who marked payment complete.

OK, let's go ahead and bill a customer. First thing to do is mark the lesson complete – you can't bill a customer for a lesson they haven't had yet – although customers can pre-pay for lessons and you can add this credit to their wallet (see earlier chapter on Customer Wallet).

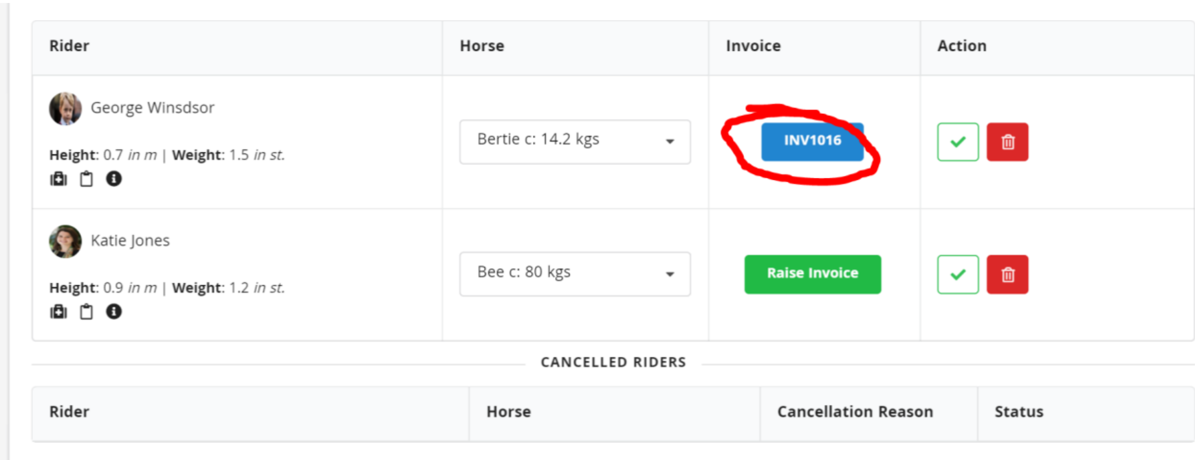
Below is a lesson that has finished so we now need to bill the customers.



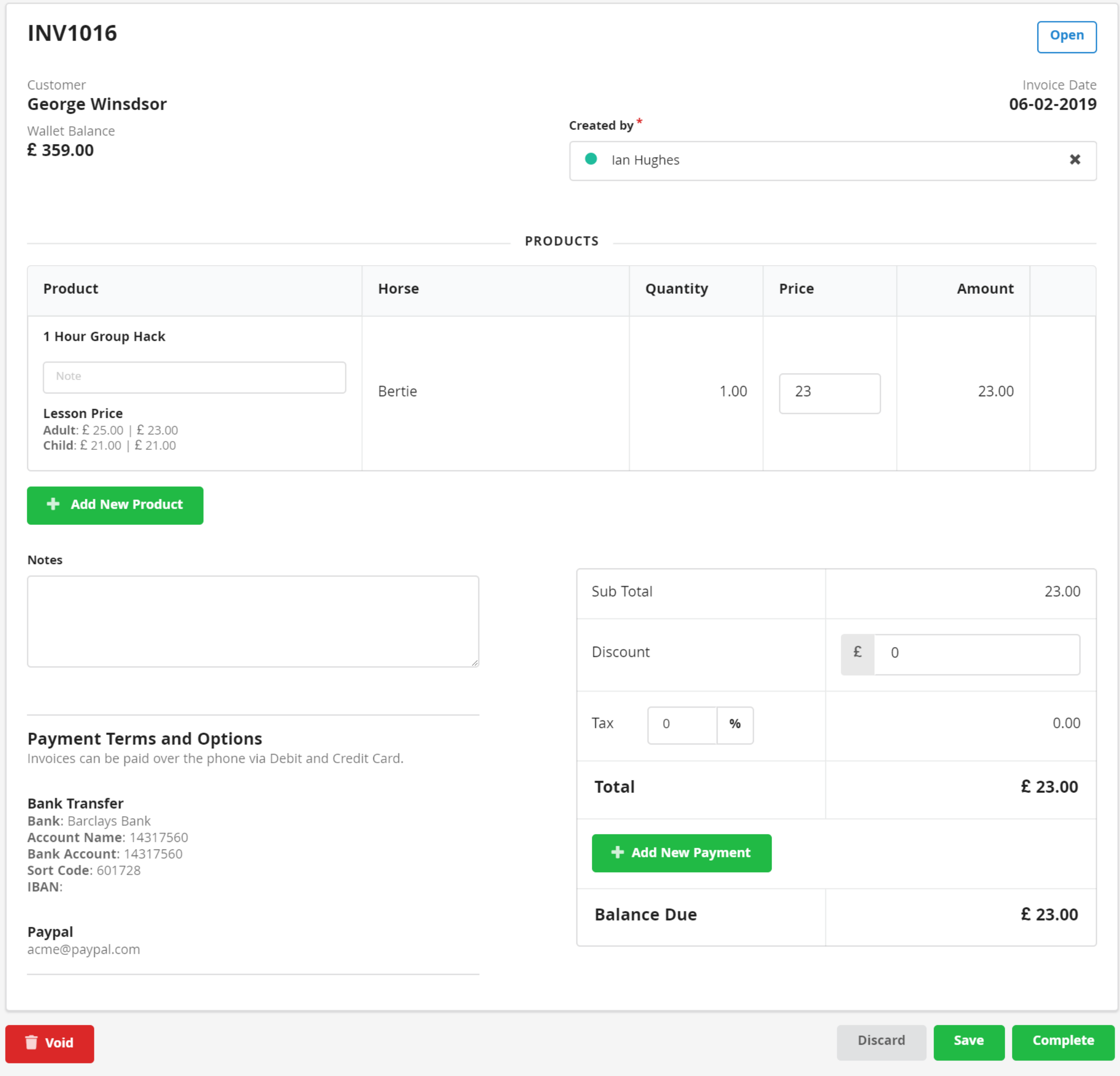
First thing to do is confirm the customer attended the lesson by marking them as complete. Do this by clicking the **Mark as Complete** button. You will then see a tick against their name as per screen below.



This means we can now raise an invoice against them. Do so, by clicking the **Raise Invoice** button highlighted above. You will see that an invoice number is automatically created as per screen below.



Click on the blue Invoice button to bring up a detailed view of the invoice. Now let's take a look at this invoice in detail and then take payment in full.



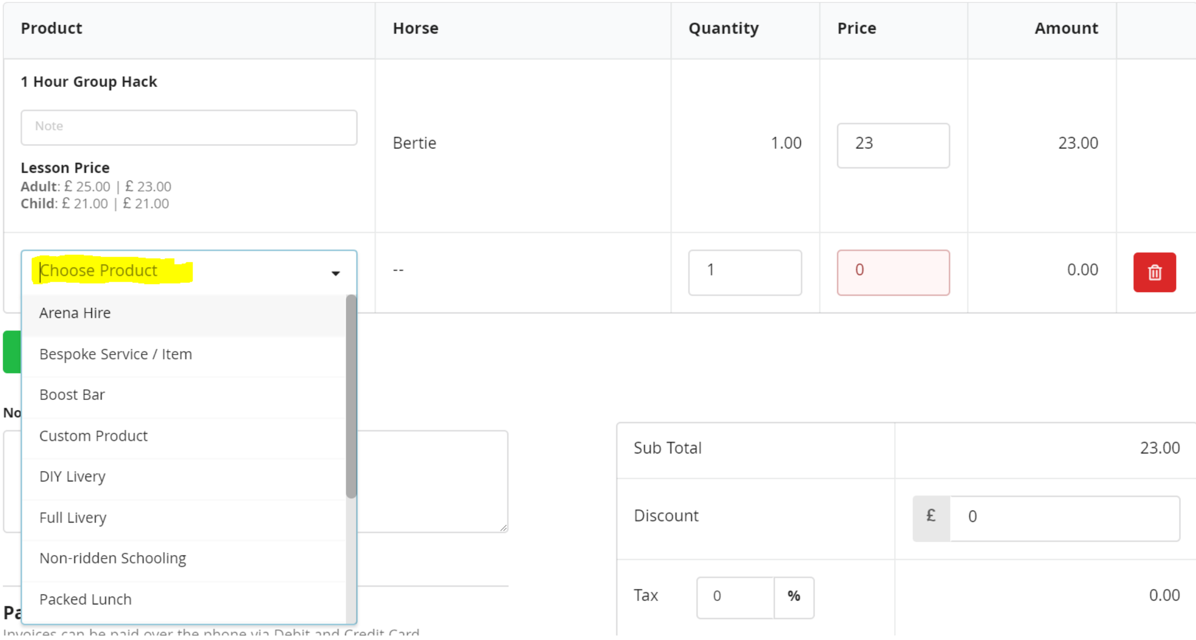
Working from the top down.

The invoice number (INV1016) is generated by the system automatically and sequentially. The next invoice generated will be INV1017 for example. The status of the invoice is **OPEN**, which means the invoice has not yet been settled.

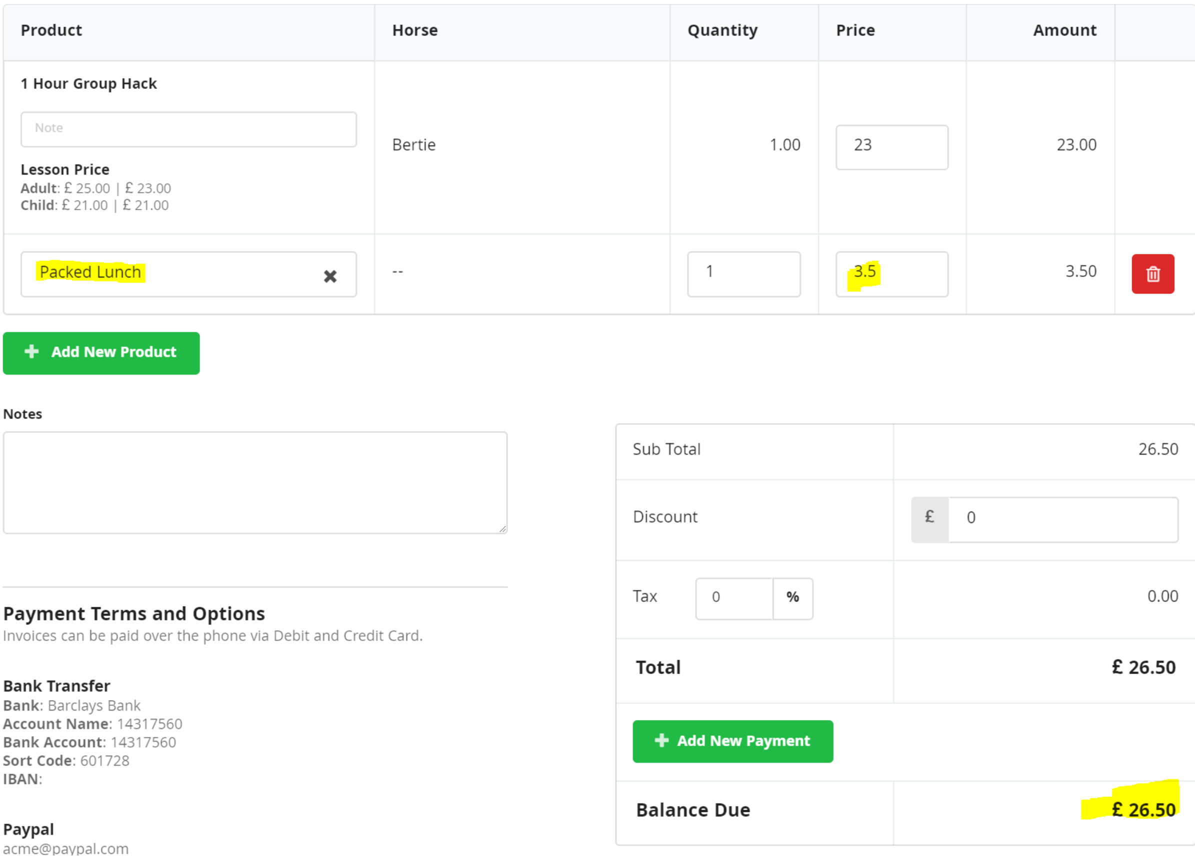
You can see the customer name (George Windsor), the date raised and the customers current Wallet Balance (£359.00) which helps determine whether this invoice can be paid on account. You will also see that this invoice was originally raised by a member of staff named Ian Hughes.

The next panel shows the details relating to the sale. In this example, you can see George took a 1 Hour Group Hack lesson @ £23.00 (Off-season Adult Price) and rode the horse Bertie. We can add products to this invoice by clicking the **Add New Product button**. Let's go ahead and add a packed lunch.

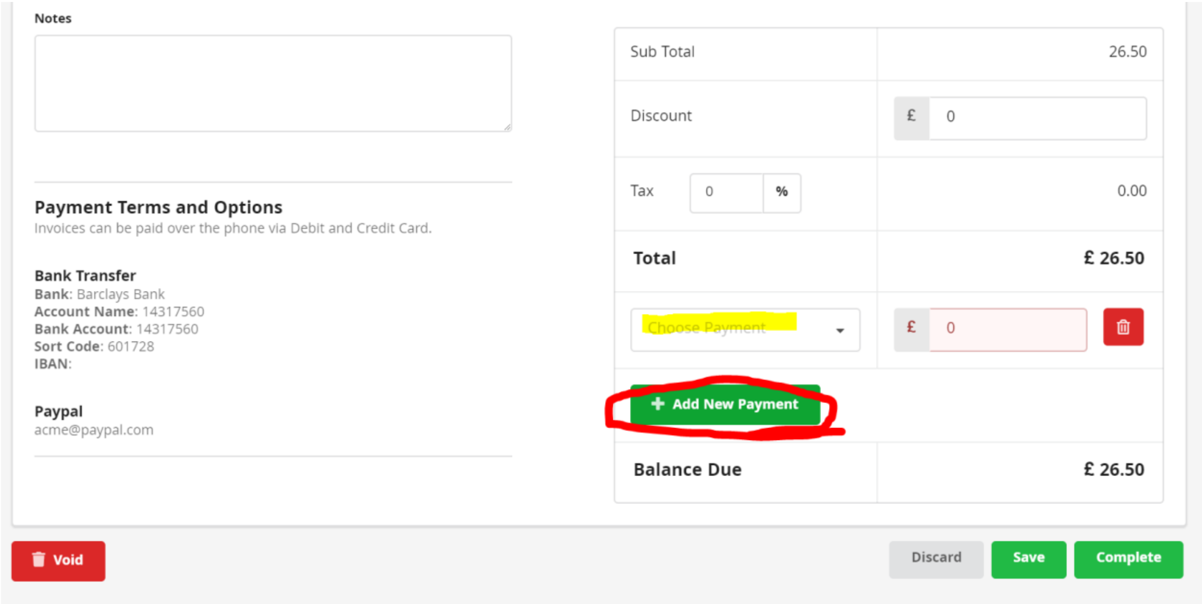
Click on the Add New Product Button



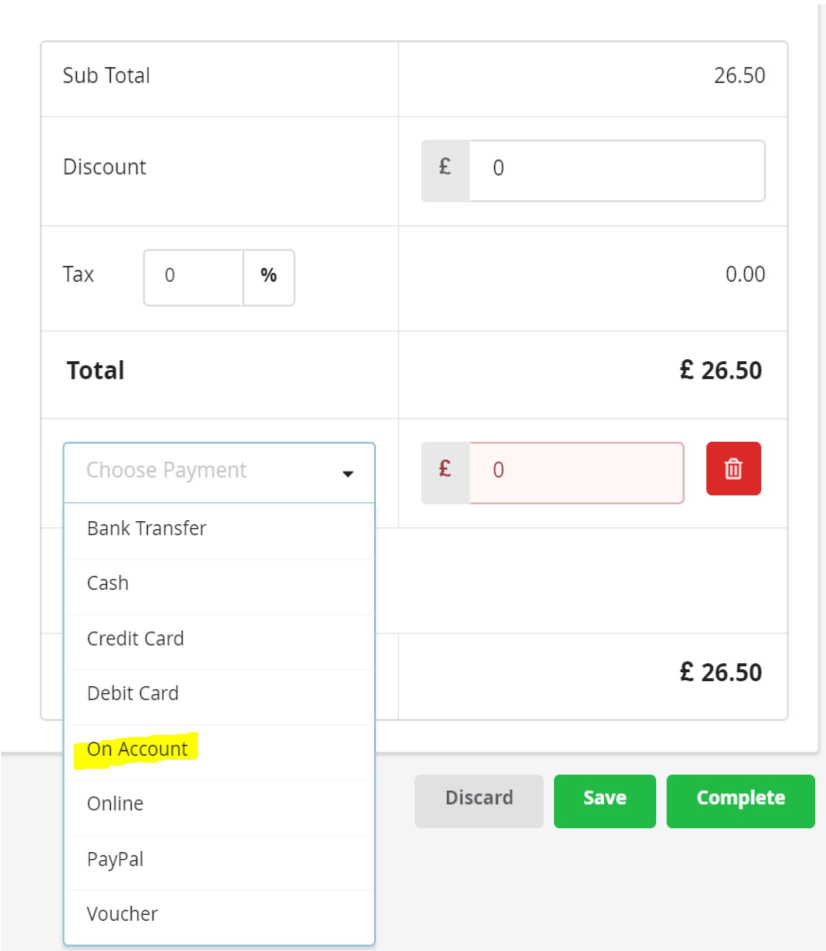
Then choose the product you wish to bill for. If you have no products available, you need to add to them – check the earlier section of this document for details on how to do this. Below we have added a packed lunch – enter the price of the product manually and the invoice total will recalculate.



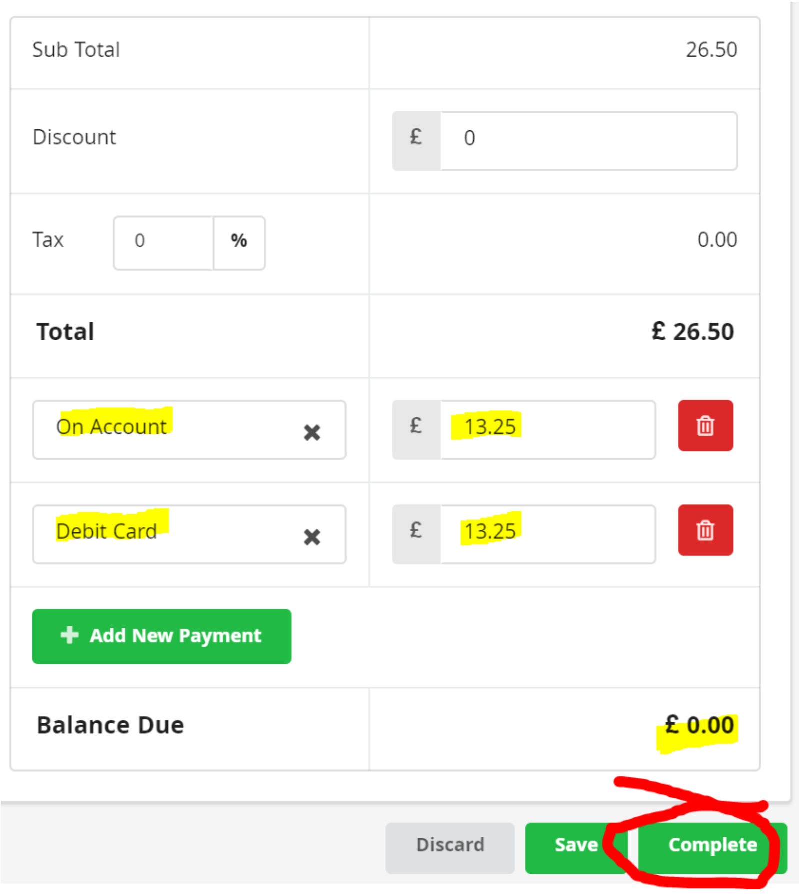
There is no limit to the number of products you can add to the invoice. Next let's process payment and mark the invoice as complete.



Click on the **Add New Payment** button then select a payment type from the drop-down payment options. In this example we will use George's Wallet Balance (On Account) to settle this invoice.



You could if you wish split payment across payment types – for example take 50% from George's wallet and the balance from a debit card.



Once you have completed the payment you then need to click complete to mark the invoice pas paid in full. Again, all transactions are audited in the system so you can see who completed this invoice should you need to.

And that's it. Now let's move on to Tasks and Horse Care.

Assigning and Managing Tasks

There are two categories of task in StableMaster; Operational and Care. Operational tasks are typically everyday tasks that need taking care of in a busy stable or riding school such as:

- Invoicing customers
- Preparing tack for lessons
- Mucking out
- Taking bookings
- Inspecting arenas and courses
- Ordering supplies
- Feeding

Whereas care tasks are focused on the health and well-being of your horses, typically:

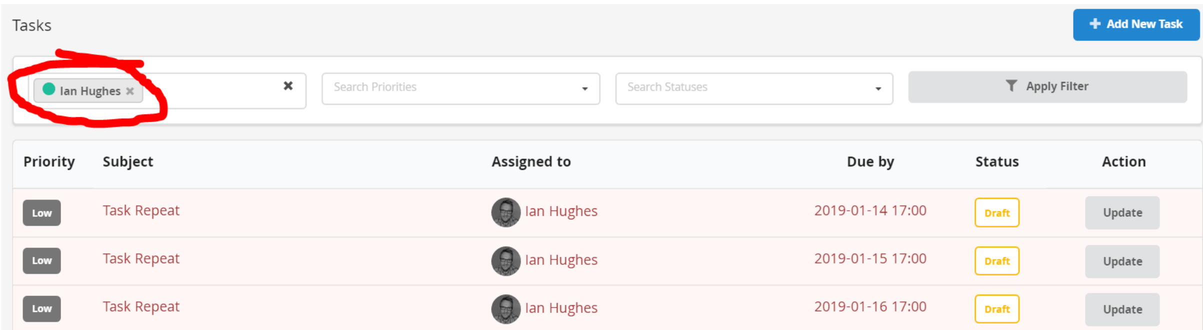
- Coggins renewal
- Vet visits
- Farrier visits
- Dentistry
- Vaccinations

In this section we will review assigning both types of task to staff and work through tasks to completion. **Staff will require training in this area to ensure they remain diligent in keeping tasks assigned to them up-to-date.**

OK, let's assign an operational task to a member of staff and then jump into the system as that member of staff to accept and complete he task. Remember, anyone can assign anyone a task in StableMaster, and everyone can see everyone's tasks – this means no crucial tasks are hidden and left incomplete.

For this demonstration I have logged in as the System Owner and will now assign a task to a member of staff. To access Tasks, click on the Tasks icon on the left-hand menu.

This icon allows you to create a new Operational task. Once clicked you will be presented with a summary of existing tasks **assigned to you.** Note the filter highlighted below.

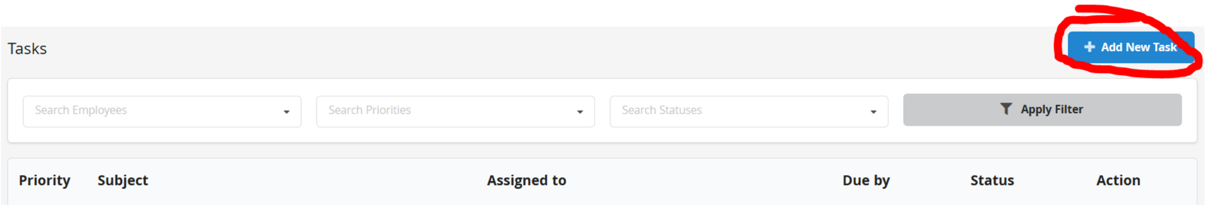


Click the **X** against the name and then click **Apply Filter** and you will be able to see ALL tasks against all staff. You can also see who the task is assigned to and the task **Status. Let's touch on task status now because this is important. Tasks can be in any of three statuses:**

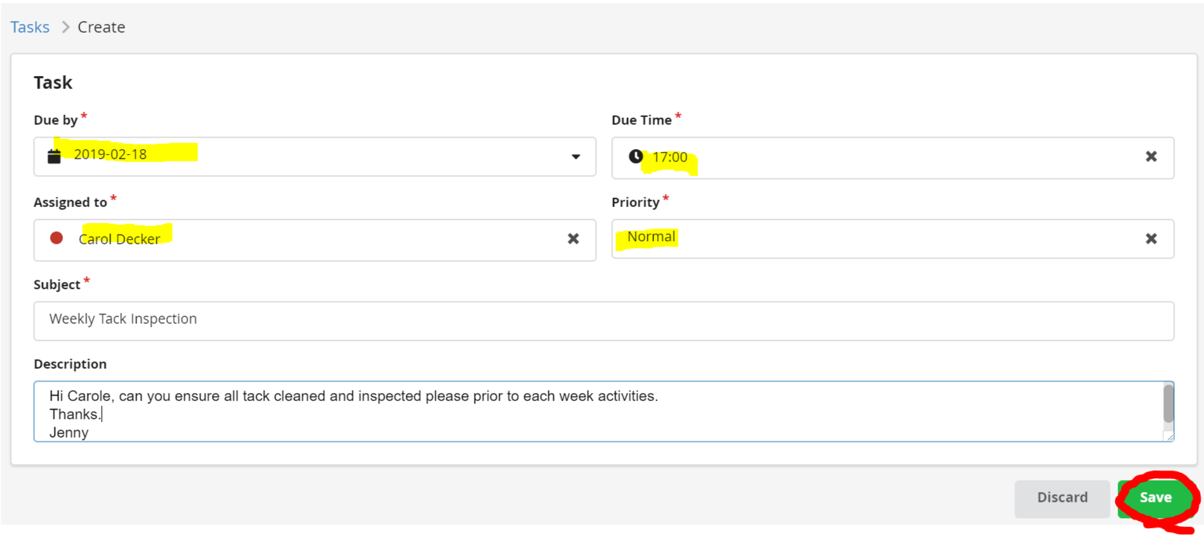
- Draft, the task bas been created in the system but has not yet been assigned to an owner.
- Assigned, the task has been created in the system and has been assigned an owner.
- Started, the owner of the task has started the task.
- Complete, the owner of the task has completed the task.

It is vital that staff update task status so that everyone has a clear view of the status of a given task.

Let's now go ahead and create a new Operational Task. Click on the **Add New Task** button.



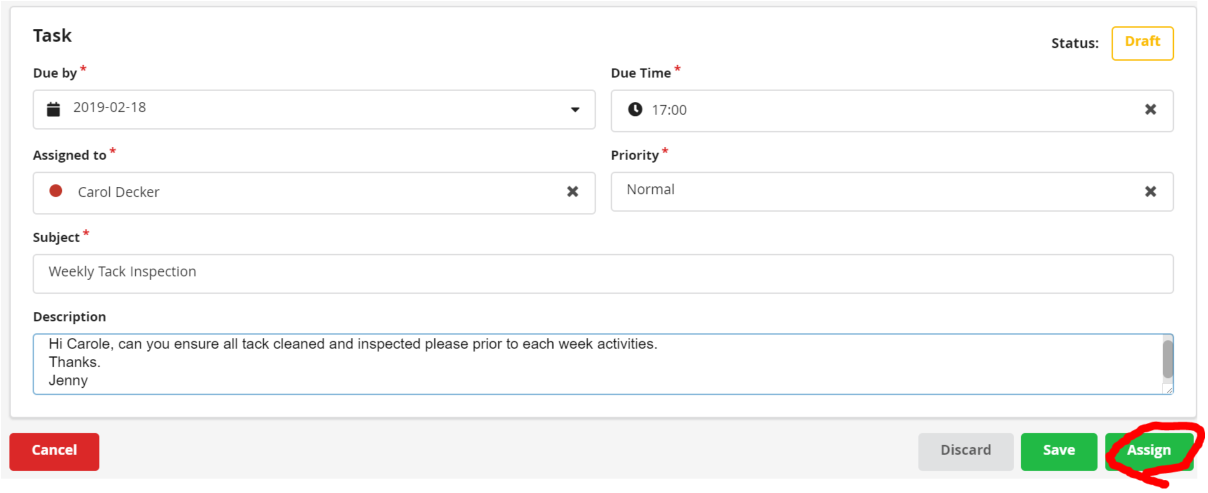
Once clicked, the create new task screen below appears.



Complete the following key detail for the task.

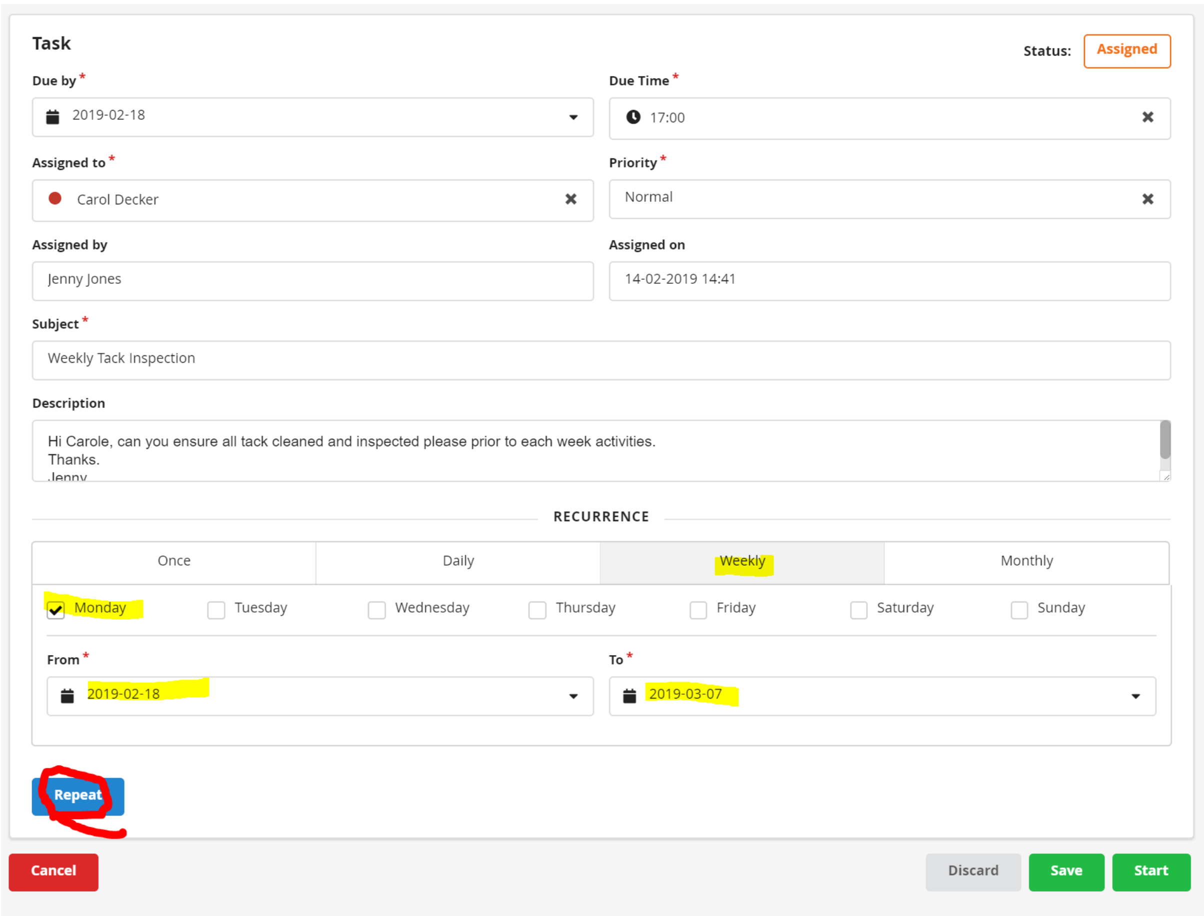
- Due by; set the date the task needs to complete.
- Due time; set a specific time by which the task needs to be completed.
- Assigned to; using the drop-down confirm who you want to own and carry out the task.
- Priority; useful to provide context to the task owner in terms of how important the task is.
- Subject; provide a summary of the task.
- Description; provide a detailed description and required outcomes for the task.

Once you have completed the detail, ensure you click **Save**. The task in now in Draft state, a task that is in Draft state has not yet been assigned an owner. You must click the Assign button to assign this task to the selected owner – Jenny Jones in this case.



Once you assign the task you then have the option to Repeat it. For example, if you have a task that is required to be completed daily, weekly or monthly, you can set them to repeat for as long as you wish. On click the Assign button, the repeat panel appears and this id where you set your repeat options. If you don’t want to repeat this task just click the Save button and move on.

The following details how to set a task to repeat.



As highlighted above, first select how often you wish the task to repeat – once, daily, weekly or monthly. In the example I have set this task to repeat weekly.

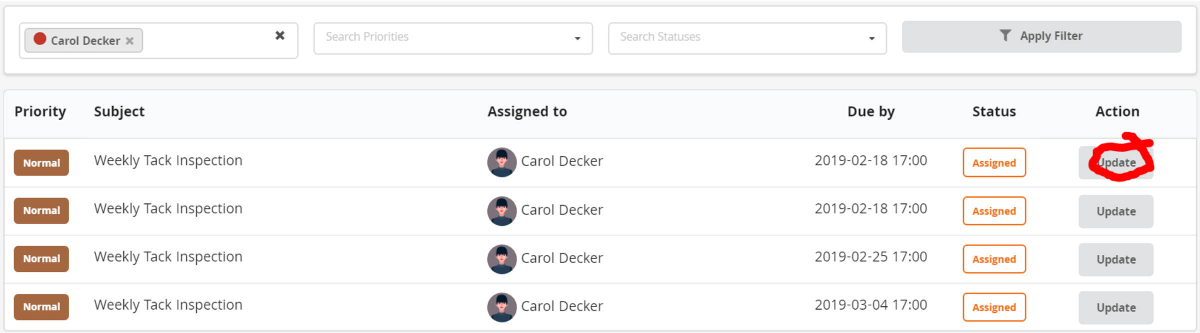
Then select the day of the week you want this task to repeat on. In the example I have opted for Monday, starting 18/2 and finishing Monday 04/03.

Now all you need do is click the blue **Repeat** button and the task will be written to the calendar. That's it!

Tip: Tasks can be re-assigned at any time regardless of whether they are set to repeat or not.

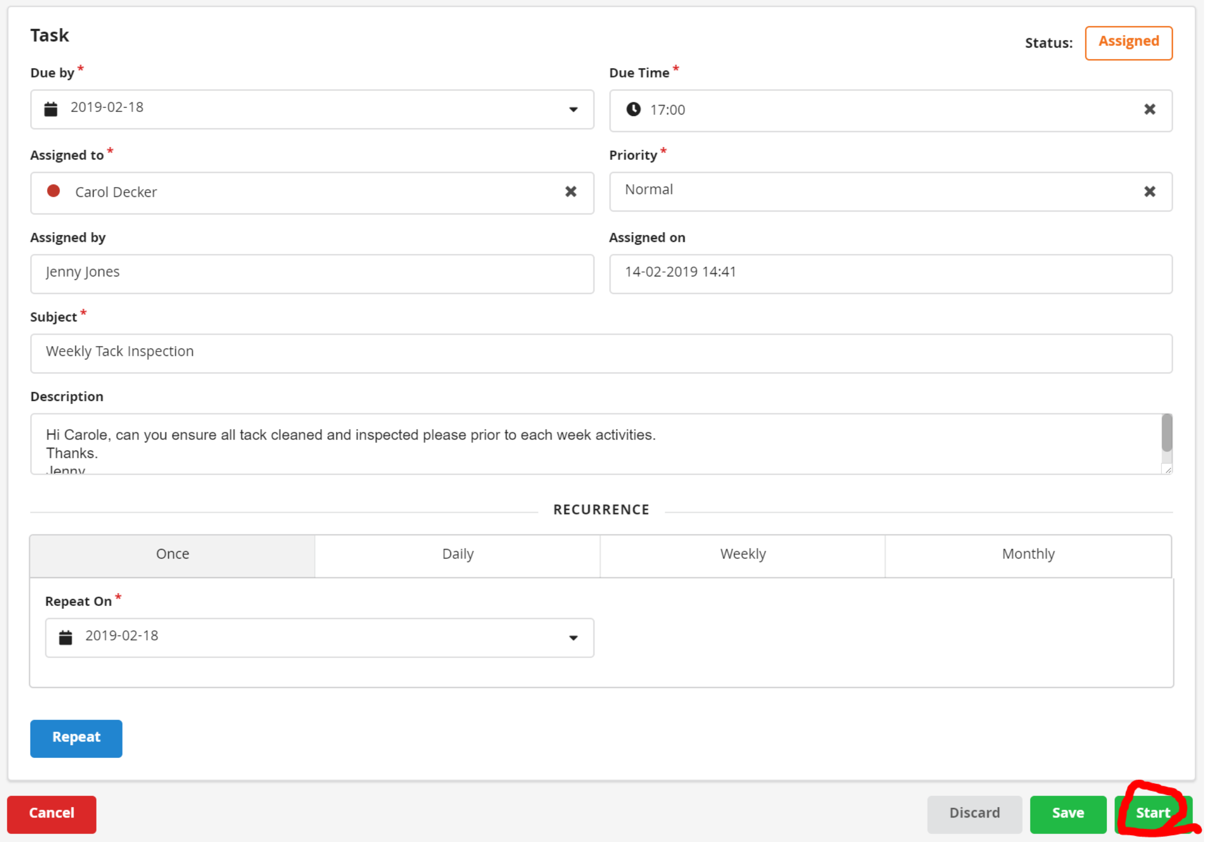
Good. We have now setup a repeat task for Ian which occurs every Monday for the next 4 weeks.

Let's go for a bit of role-play now. Let's pretend I am Carol and I have logged into StableMaster to review my tasks for the day. If I click on the **Tasks** icon, I will see a list of tasks filtered to my name as per below.

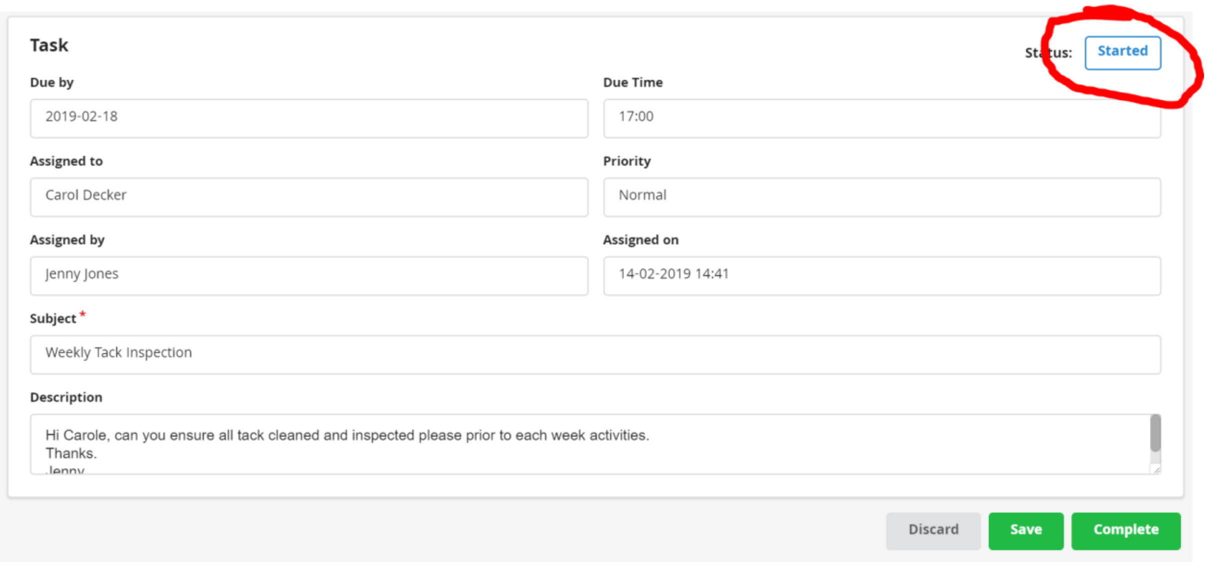


Priority	Subject	Assigned to	Due by	Status	Action
Normal	Weekly Tack Inspection	Carol Decker	2019-02-18 17:00	Assigned	Update
Normal	Weekly Tack Inspection	Carol Decker	2019-02-18 17:00	Assigned	Update
Normal	Weekly Tack Inspection	Carol Decker	2019-02-25 17:00	Assigned	Update
Normal	Weekly Tack Inspection	Carol Decker	2019-03-04 17:00	Assigned	Update

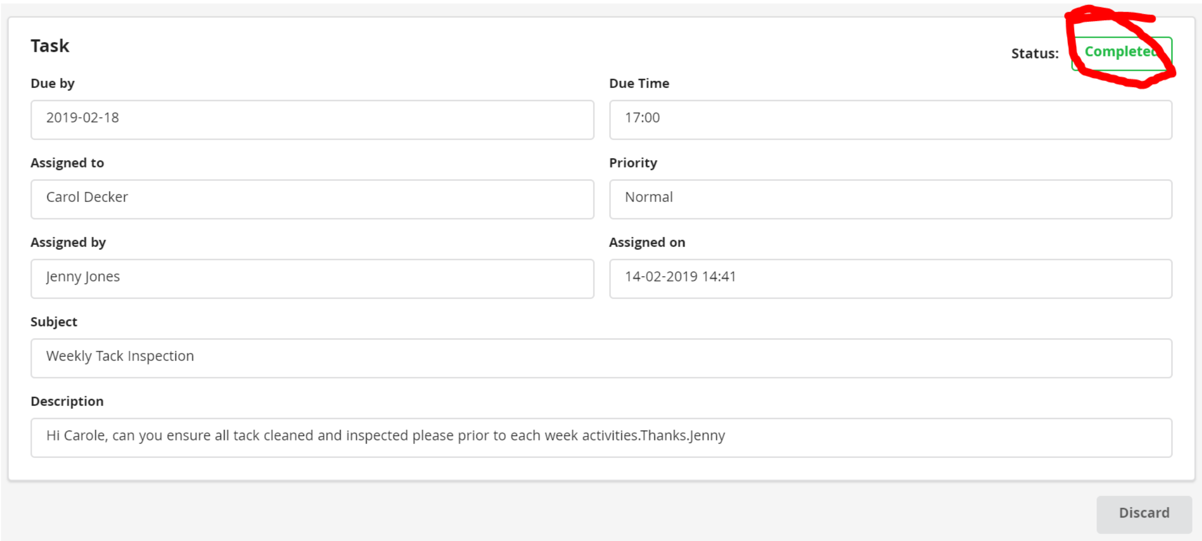
I am now going to start/update the first task by clicking on the **Update** action button. The task detail is presented, and I now wish to **Start** the task.



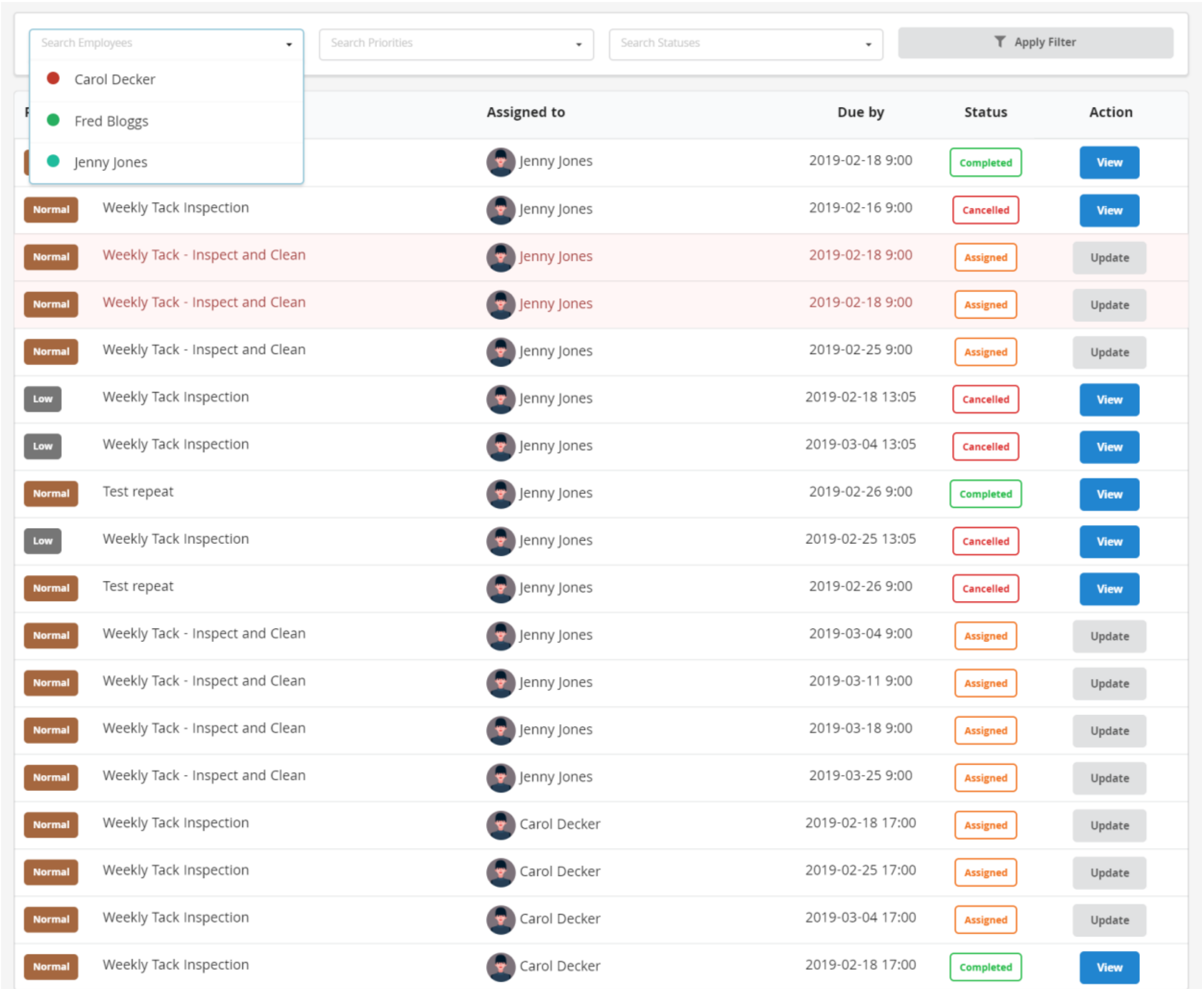
Click the start button to confirm the system that the task in underway – note the status changes to **Started.**



Once Carol has completed the task she simply clicks the Complete button and the status is updated.



So, the first occurrence of this task is now complete. Don't forget you can filter Tasks to one employee, a few or all by changing the across the top of the main Tasks screen.



P		Assigned to	Due by	Status	Action
		Jenny Jones	2019-02-18 9:00	Completed	View
Normal	Weekly Tack Inspection	Jenny Jones	2019-02-16 9:00	Cancelled	View
Normal	Weekly Tack - Inspect and Clean	Jenny Jones	2019-02-18 9:00	Assigned	Update
Normal	Weekly Tack - Inspect and Clean	Jenny Jones	2019-02-18 9:00	Assigned	Update
Normal	Weekly Tack - Inspect and Clean	Jenny Jones	2019-02-25 9:00	Assigned	Update
Low	Weekly Tack Inspection	Jenny Jones	2019-02-18 13:05	Cancelled	View
Low	Weekly Tack Inspection	Jenny Jones	2019-03-04 13:05	Cancelled	View
Normal	Test repeat	Jenny Jones	2019-02-26 9:00	Completed	View
Low	Weekly Tack Inspection	Jenny Jones	2019-02-25 13:05	Cancelled	View
Normal	Test repeat	Jenny Jones	2019-02-26 9:00	Cancelled	View
Normal	Weekly Tack - Inspect and Clean	Jenny Jones	2019-03-04 9:00	Assigned	Update
Normal	Weekly Tack - Inspect and Clean	Jenny Jones	2019-03-11 9:00	Assigned	Update
Normal	Weekly Tack - Inspect and Clean	Jenny Jones	2019-03-18 9:00	Assigned	Update
Normal	Weekly Tack - Inspect and Clean	Jenny Jones	2019-03-25 9:00	Assigned	Update
Normal	Weekly Tack Inspection	Carol Decker	2019-02-18 17:00	Assigned	Update
Normal	Weekly Tack Inspection	Carol Decker	2019-02-25 17:00	Assigned	Update
Normal	Weekly Tack Inspection	Carol Decker	2019-03-04 17:00	Assigned	Update
Normal	Weekly Tack Inspection	Carol Decker	2019-02-18 17:00	Completed	View

Have a play around with the filters to see how they work.

Scheduling Events

StableMaster allows you to schedule specific one-off events and add riders, horses, staff, arenas and products to them. Typical events you schedule could include:

- Showing
- Jumping
- Open Days

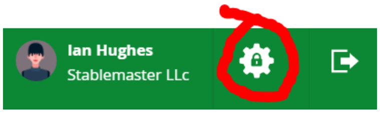
But they could also include:

- Staff Holiday
- Horse Layoff
- Arena or course closure

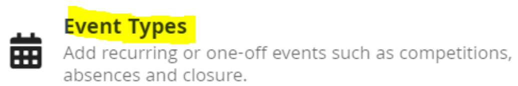
We encourage you to explore the uses of events and apply them in the context of your operation setup. Lets deep-dive into events. In the next pages we will:

- Review and create an Event Type
- Schedule an event
- Assign riders, horses, staff and arenas
- Create products such as entry fees
- Bill for the products
- Log the event results

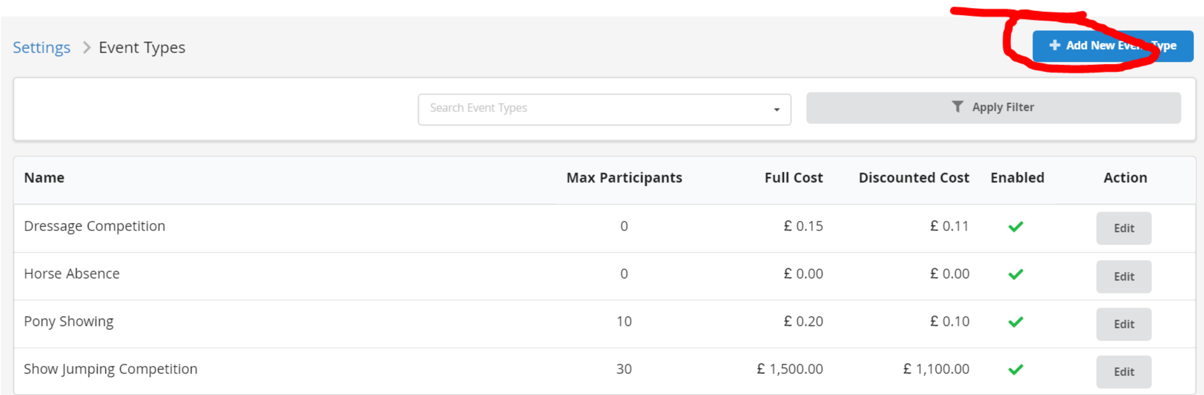
First, lets setup a new Event type. Head over to your settings page



And find the Events Types icon



Clicking on it will bring up the following screen, go ahead and click on **Add New Event Type.**

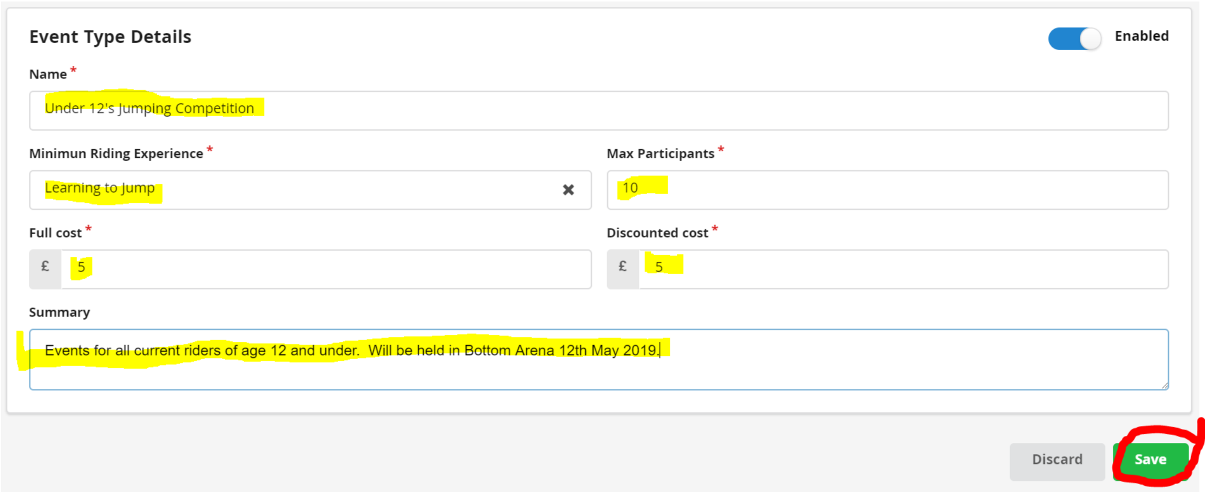


Settings > Event Types

Search Event Types | Apply Filter

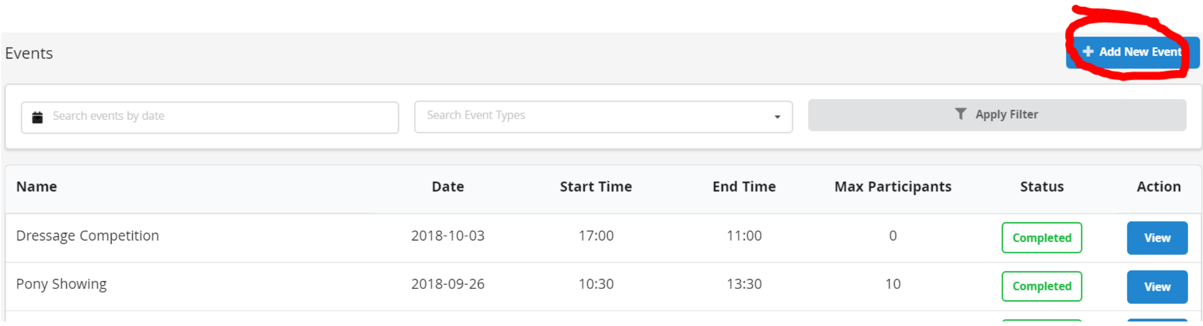
Name	Max Participants	Full Cost	Discounted Cost	Enabled	Action
Dressage Competition	0	£ 0.15	£ 0.11	✓	Edit
Horse Absence	0	£ 0.00	£ 0.00	✓	Edit
Pony Showing	10	£ 0.20	£ 0.10	✓	Edit
Show Jumping Competition	30	£ 1,500.00	£ 1,100.00	✓	Edit

The following screen will appear

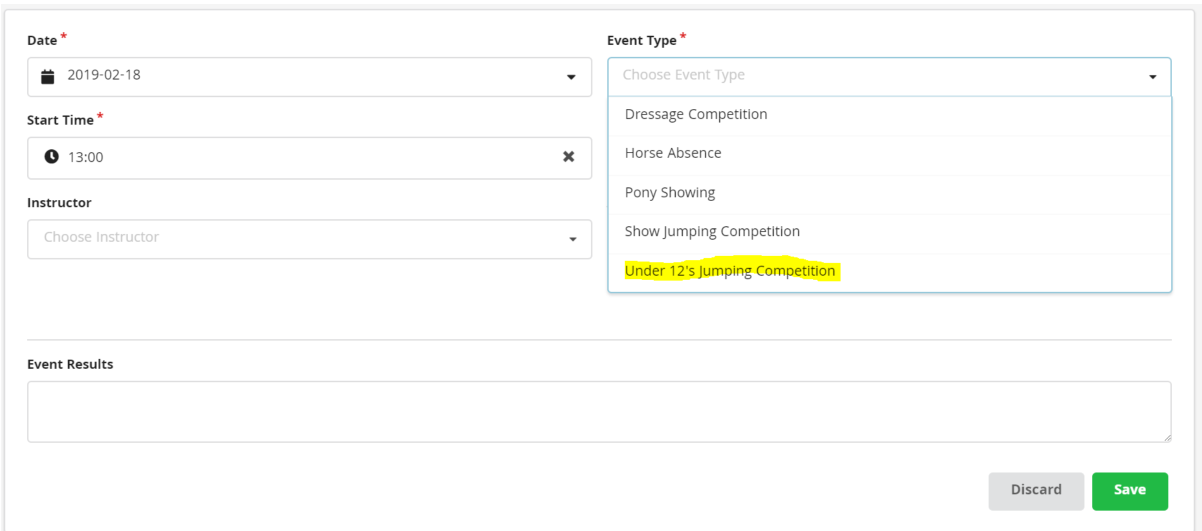


Go ahead and complete all the detail highlighted not forgetting to press **Save.** Great, you have created a new Event type – we can now go ahead and schedule this event.

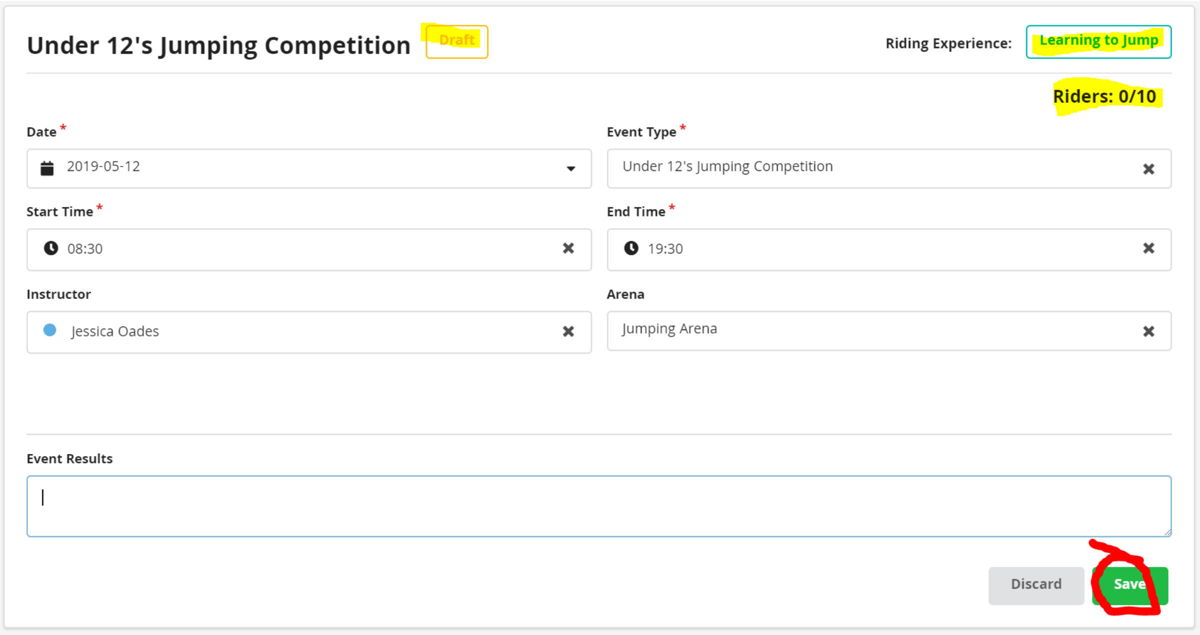
To begin scheduling, click on the Events icon on the left-hand menu. Then click **on Add New Event.**



The following screen will appear

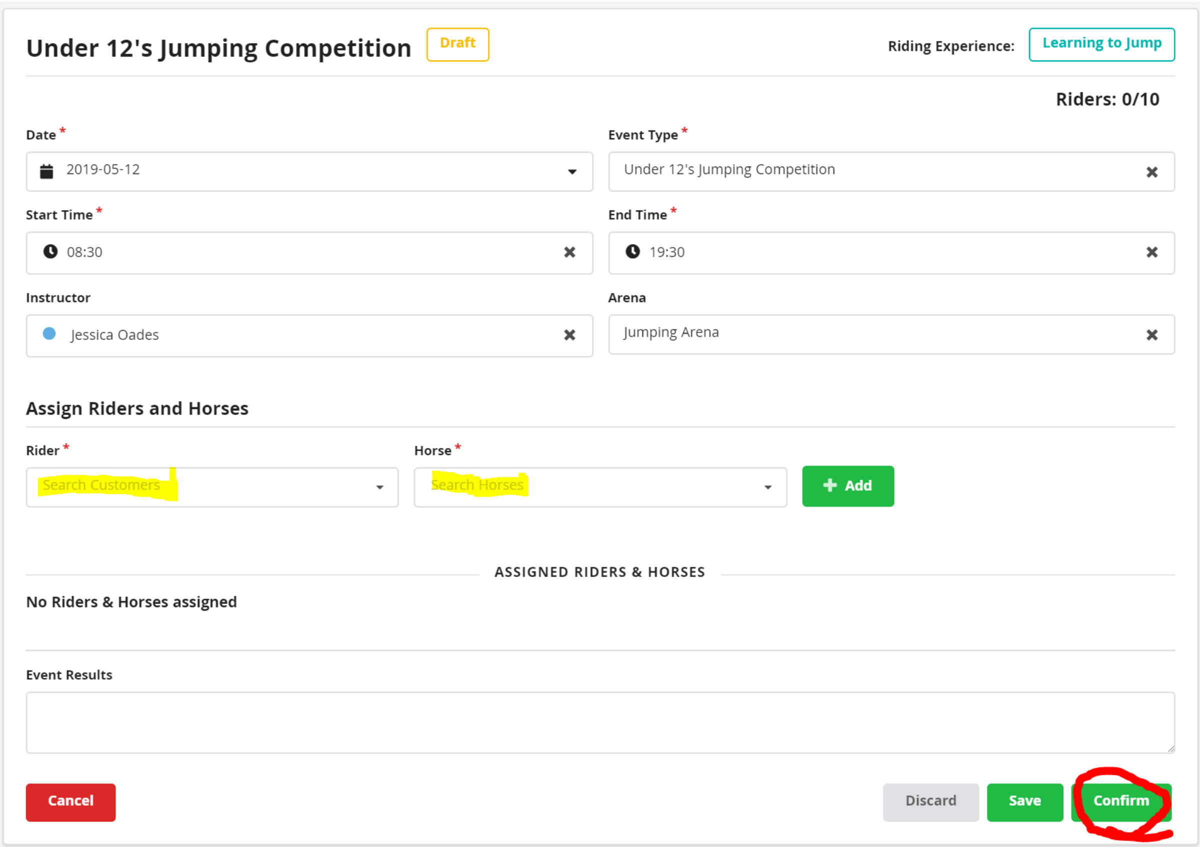


Go ahead and select the **Event Type** first, when you do this the following screen appears which contains configuration information you setup in the corresponding event type (highlighted in Yellow)



You now just need to complete the rest of the detail highlighted. In this example the event is an all day jumping competition open to a mximum of 10 riders. At this point the event is in draft (has not been submitted to the Calendar) and we have yet to assign riders and horses.

Go ahead and click **Save.**

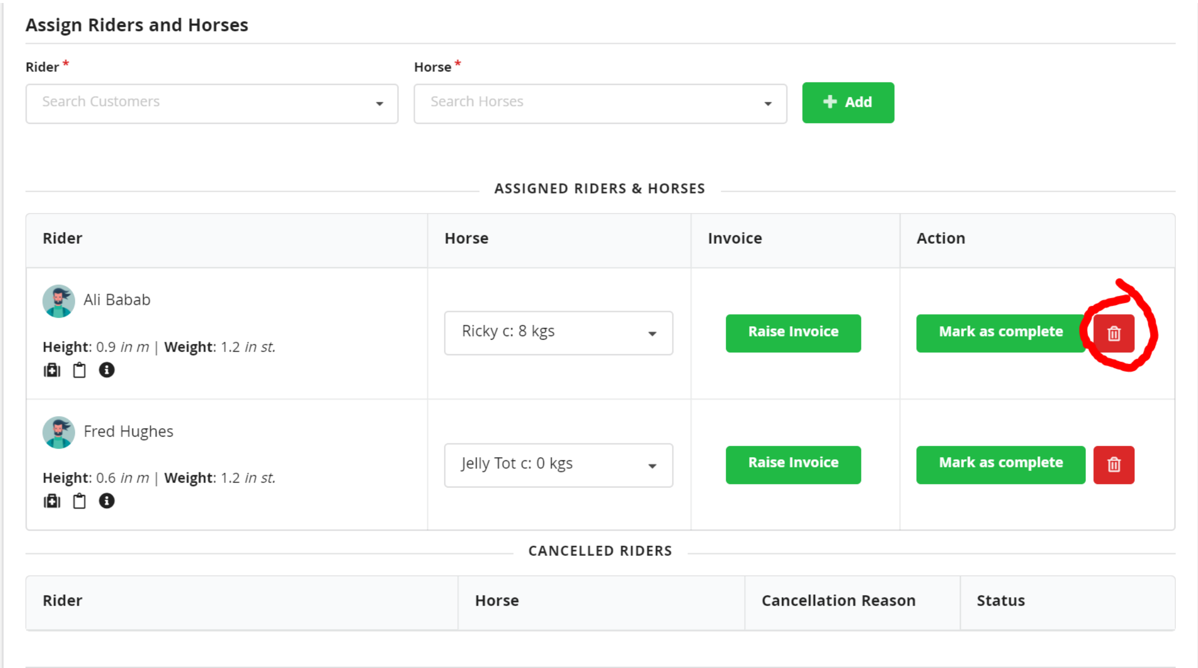


You can now start adding riders and horses. Riders and horses can be added and removed at any point prior to the event status being set to **Complete** – this provides flexibility if customers cancel before the event or horses become injured.

To get the event in the calendar and to lock down horses, riders and staff ensure you press **Confirm.**

Important Note - You can go back in and edit this event anytime just ensure you press Save each time you do so.

To cancel a rider simply click on the Trash Bucket icon next to the name of the rider you wish to cancel.



Great, so we now have an event setup with the chosen parameters. Let's time hop to the 12th May 2019 and complete the event. Over the event period planning stage a number of additional riders were added to the event whilst one rider cancelled – as depicted in the screen below.

Rider	Horse	Invoice	Action
Fred Hughes **Height**: 0.6 *in m* | **Weight**: 1.2 *in st.*	Jelly Tot c: 0 kgs	Raise Invoice	Mark as complete
Helen Hall **Height**: 0 *in m* | **Weight**: 0 *in st.*	Bertie c: 0 kgs	Raise Invoice	Mark as complete
Ali Babab **Height**: 0.9 *in m* | **Weight**: 1.2 *in st.*	Lucy c: 12 kgs	Raise Invoice	Mark as complete
Minnie Smith **Height**: 0 *in m* | **Weight**: 0 *in st.*	Yogi c: 0 kgs	Raise Invoice	Mark as complete
George Oades **Height**: 0 *in m* | **Weight**: 0 *in st.*	Rufus c: 0 kgs	Raise Invoice	Mark as complete

CANCELLED RIDERS

Rider	Horse	Cancellation Reason	Status
Ali Babab **Height**: 0.9 *in m* | **Weight**: 1.2 *in st.*	Ricky	wq	Cancelled

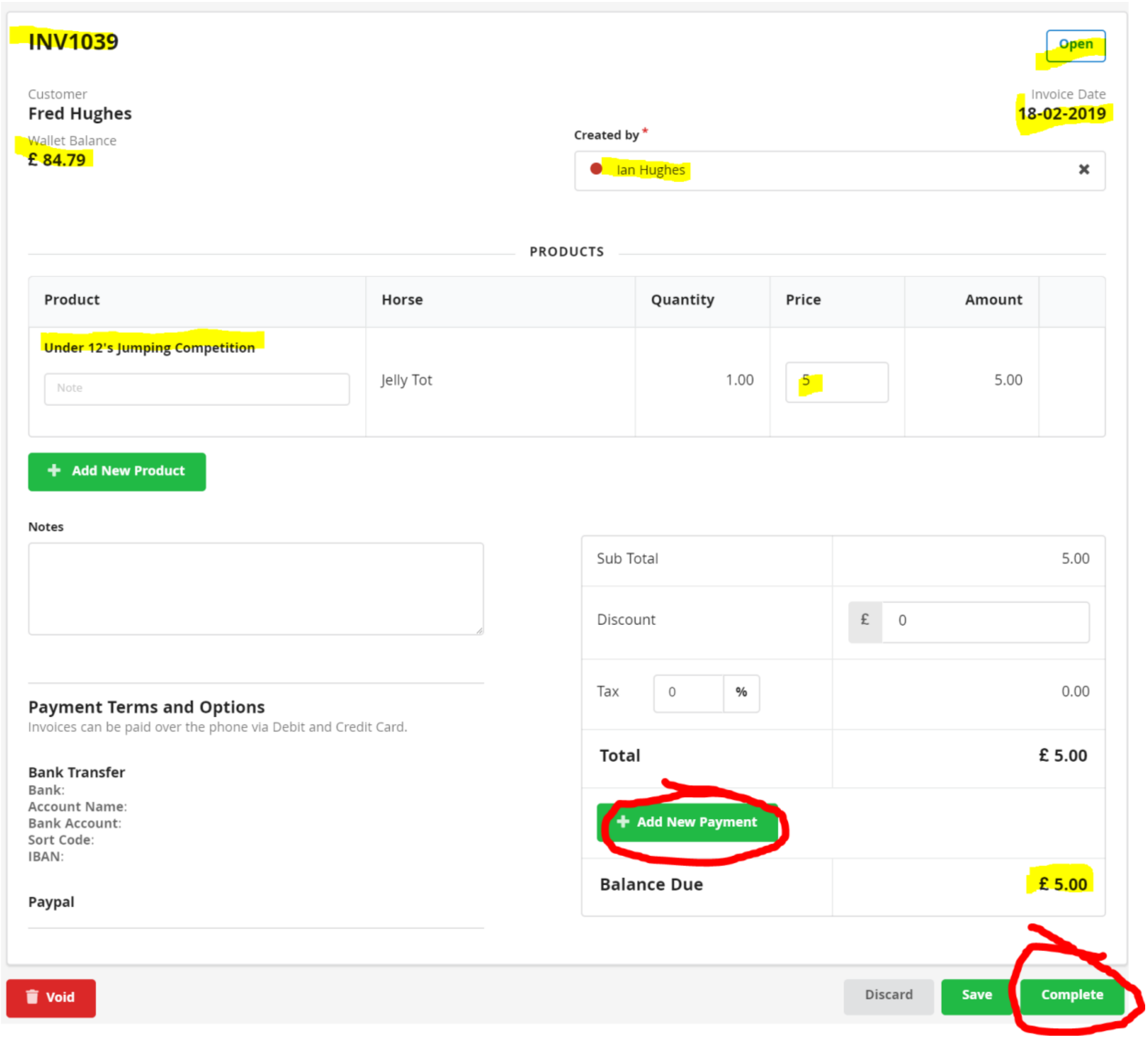
Let's assume that the event has now finished, and we wish to invoice customers who participated. For the purposes of this exercise we will go ahead and invoice Fred Hughes who rode Jelly Tot.

First thing to do is confirm he took part in the event – do this by clicking the **Mark as Complete** button next to his name. Now let's go ahead and raise an invoice. Do this by clicking **the Raise Invoice** button.

We can see Fred's record now looks like this.

Rider	Horse	Invoice	Action
Fred Hughes **Height**: 0.6 *in m* | **Weight**: 1.2 *in st.*	Jelly Tot c: 0 kgs	INV1039	

Invoice 1039 has been generated, let's go ahead and dig into the detail of this invoice and send it to Fred. Click on the blue Invoice Button to do this open it. The full invoice information is now displayed, lets work through some of the key detail on this invoice, working our way from the top down.

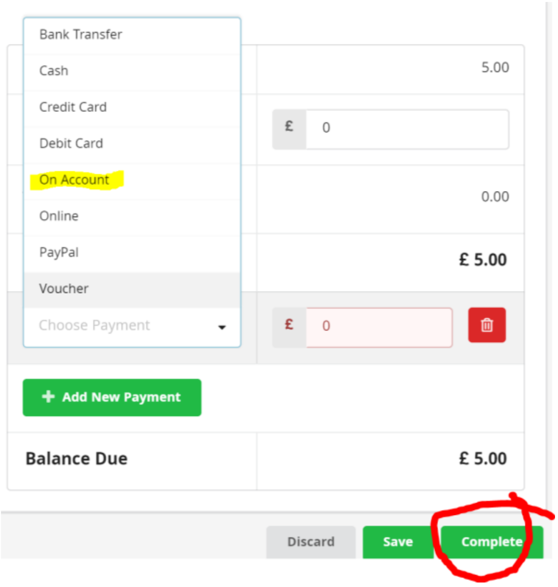


As you can see the invoice number has been generated (1039) and the status of the invoice is **Open**, meaning it has been raised but not yet settled by the customer. The customer is obviously Fred and the invoice created by the member of staff named. Invoice date is today's date.

The **Wallet Balance** allows us to see whether Fred has enough credit to pay for this invoice **On Account.** He does.

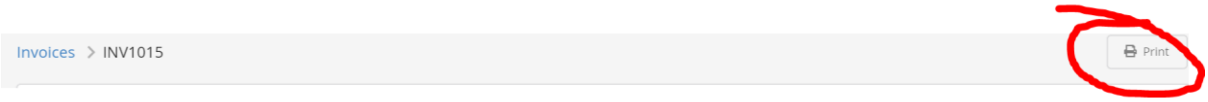
We can see that product panel lists the product we are billing Fred for and the total price. We can add new products here should we wish to. Then we have the payment terms, tax and the possibility to add notes and apply a discount. All standard information for an invoice.

Next, we need to take payment. Let's start by clicking on the **Add New Payment** button.



You can split payment across payment types should you wish to. Click the **Complete** button and we have successfully taken payment for this invoice from Fred's Wallet. Tadaah!

We can send Fred a copy invoice via email by clicking on the

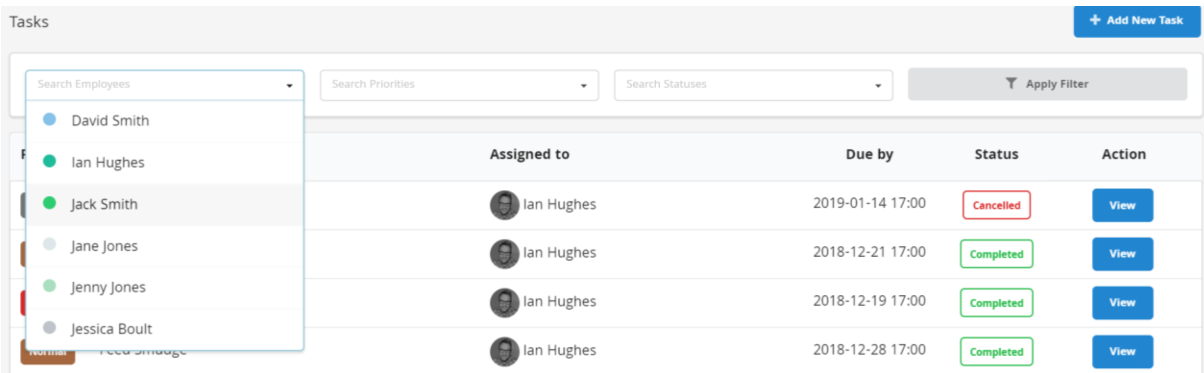


Invoice print button. In the next release of StableMaster there will be an option to email directly to the client.

General Hints and Tips

Filter Views

StableMaster uses filters for almost all views meaning that the person who is logged in sees information relevant to them; tasks, care, lessons etc. We recommend you learn to use and understand these filters early on as sometimes it may look like information is missing.



Events Usage

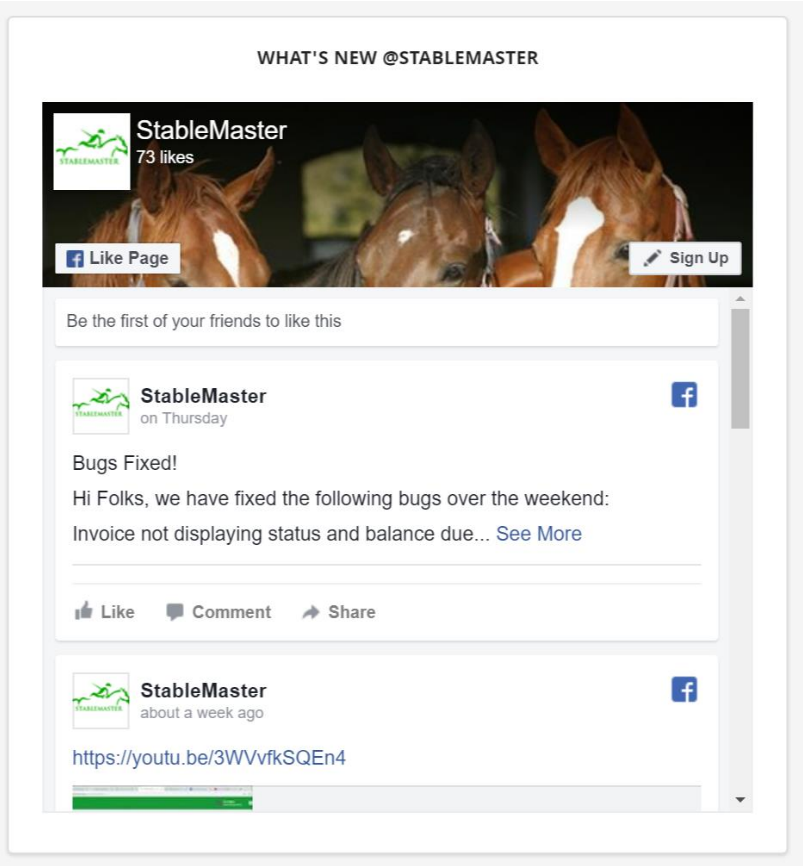
The Events function can be used to make specific resources unavailable for booking for a set period; for example, an instructor going on annual leave or a horse being laid off for a period of rest. We have published several videos on how to achieve this and they are available via our in-app Facebook feed or just drop us an email for more information.

Dashboard Views

We want the Dashboard Views to be as useful as possible to customers – if you have any ideas for new reports or functionality then please do drop us a line and we will do our best to include it.

In App Facebook Feed

We publish latest news and tutorials via our in-app Facebook Feed. Please check it regularly to keep abreast of all that's happening at StableMaster.



Customised Products

We've built in the option for customers to be able to bill for their own custom products. We recommend you explore this powerful option to unlock the full potential of StableMaster. We have published several videos on how to do this via our in-app Facebook feed.