



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,

A handwritten signature in black ink that reads "Ian Hughes". The script is fluid and cursive, with the first letters of "Ian" and "Hughes" being capitalized and prominent.

Ian Hughes

Founder, StableMaster

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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.

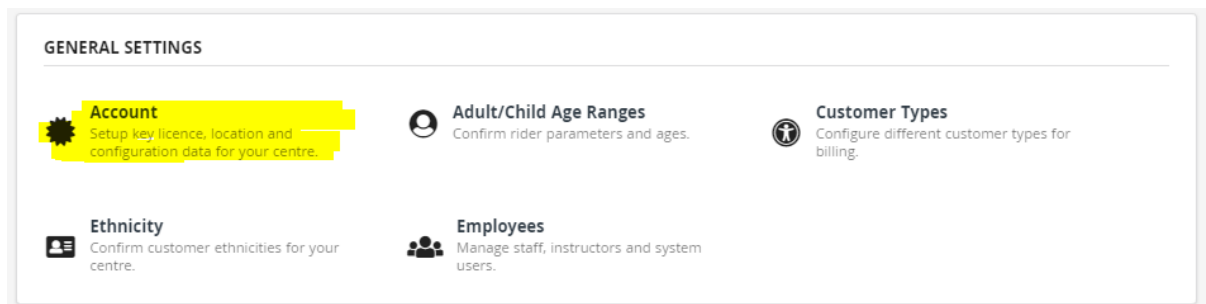


Click once on the **Settings** icon to open the overall settings page. Click on the button and you will be presented with a plethora of settings options. First thing to setup is your Account detail.

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

Adding your Account information

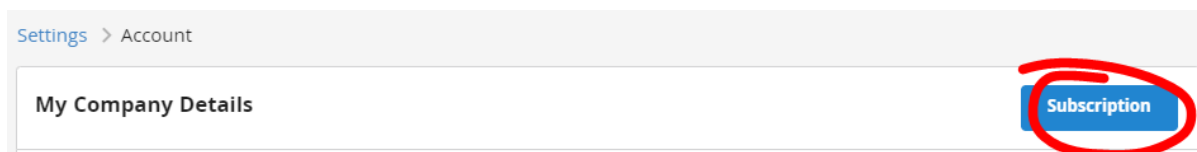
First thing to setup is your Account detail.



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.

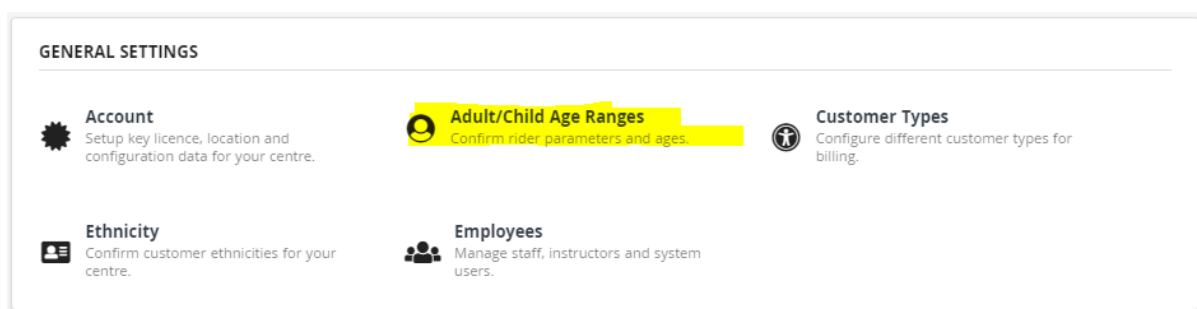
Managing your Subscription

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



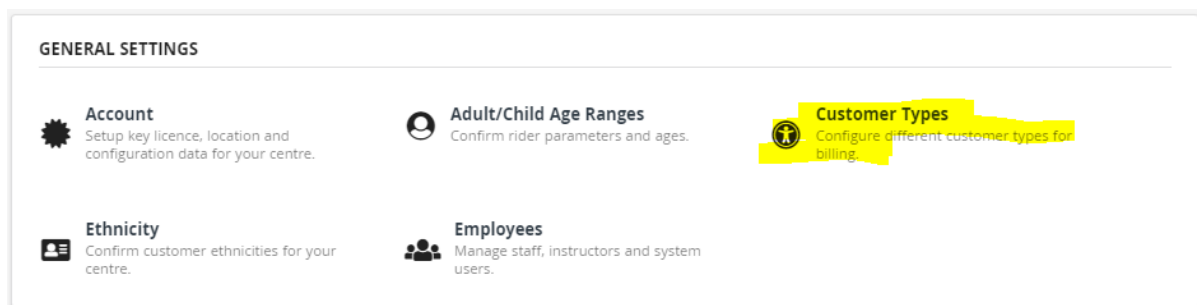
Only the **System Owner** can access this area – the system owner being the person who originally signed up for the StableMaster trail, normally the business owner senior manager. Click on the **Subscription** button and you will be presented with the detail of your current subscription and plans available.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

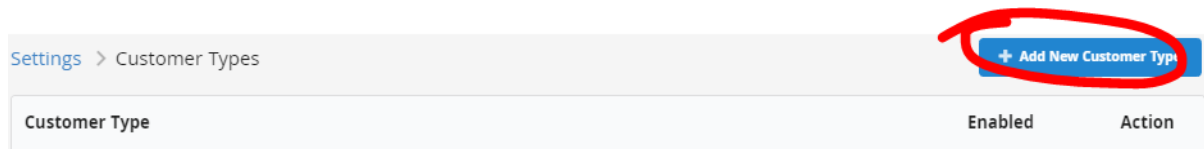
Creating Customer Types



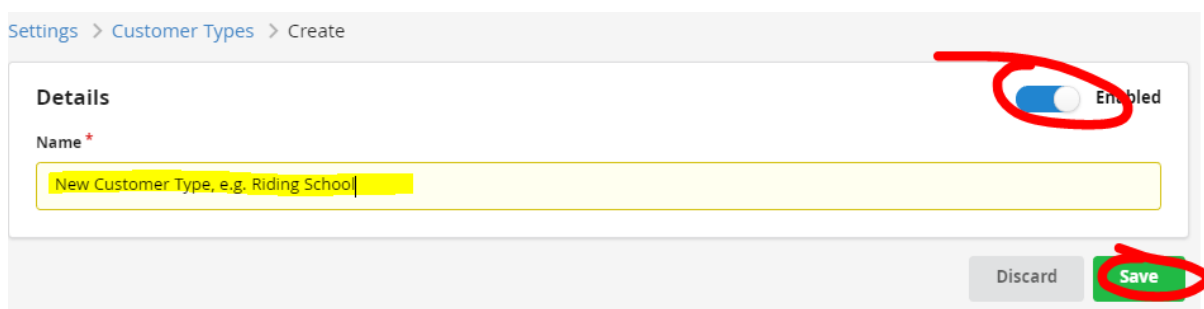
It is vital that your customer types are setup. Most business have numerous customer types such as; Riding School, Full/Part Livery, Senior, Junior, College etc. You assign a customer type to each new customer you setup so that you can then report on revenue by

type for instance. Take time to think about the different customer categories you might have and add them.

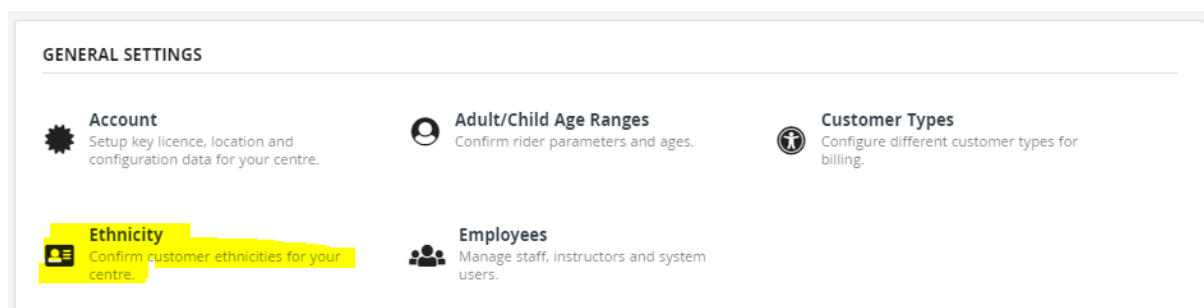
Adding a customer type is simple. Simple **Click New Customer type**



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

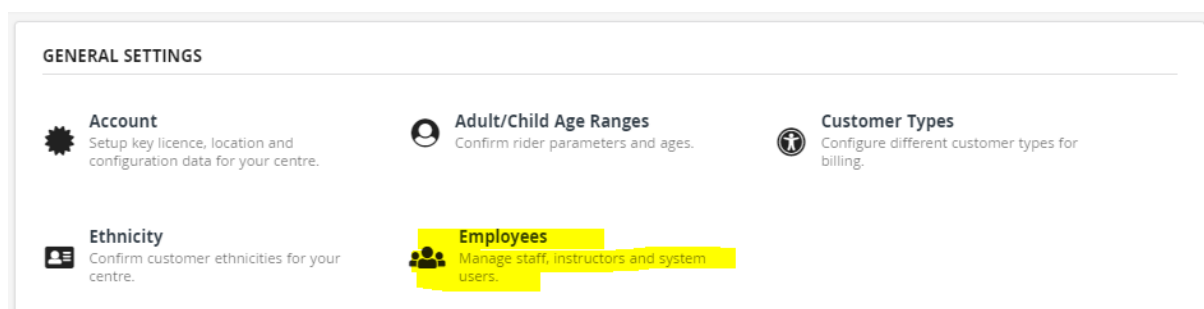


Adding Ethnicities



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.

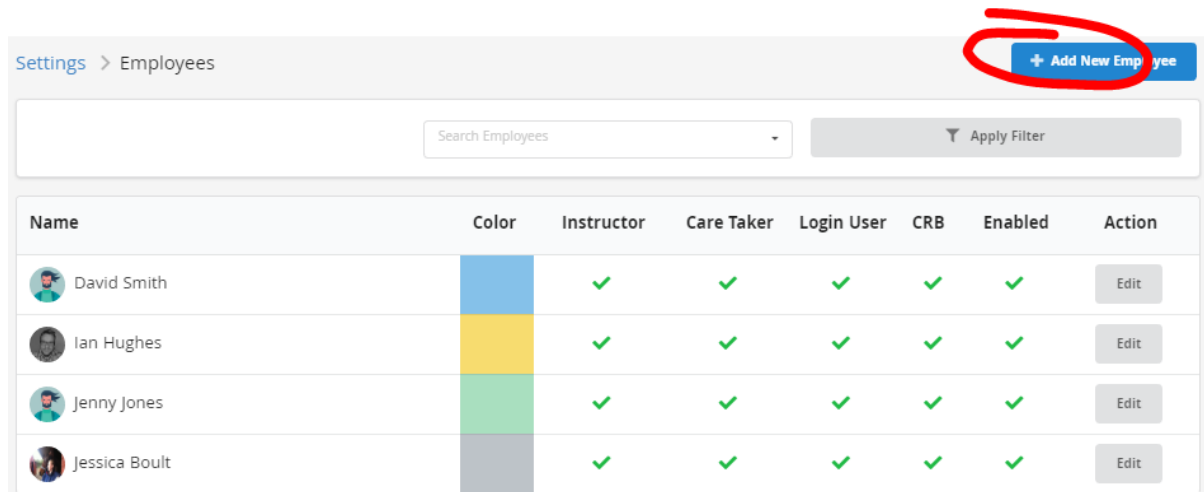
Administrator; has the same privileges as the owner including the ability to setup new staff in the systems but **cannot** change the subscription.

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.











Settings > Employees

+ Add New Employee

Search Employees

Apply Filter

Name	Color	Instructor	Care Taker	Login User	CRB	Enabled	Action
 David Smith		✓	✓	✓	✓	✓	Edit
 Ian Hughes		✓	✓	✓	✓	✓	Edit
 Jenny Jones		✓	✓	✓	✓	✓	Edit
 Jessica Boulton		✓	✓	✓	✓	✓	Edit

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.

Settings > Employees > Create

Select a color:

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.

Employee Details

First Name *

Last Name *

Mobile Number *

Email *

Gender

☐ Male

Date of birth

☒ Enabled

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.

Employee Settings

Instructor

☒

Care Taker

☒

Login User

☒

CRB

☒

User Name *

Password *

Role *

BHS/ABRS/ORG member number

Qualification

Riding experience

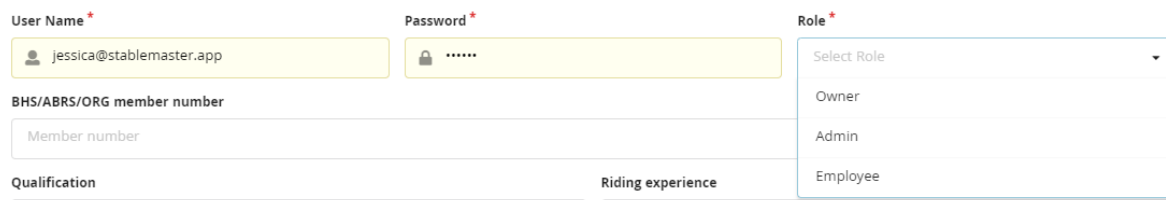
Instructor; dictates whether particular employee be assigned as an instructor for riding lessons or classroom-based learning for example.

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.



The screenshot shows a staff setup form with the following fields and options:

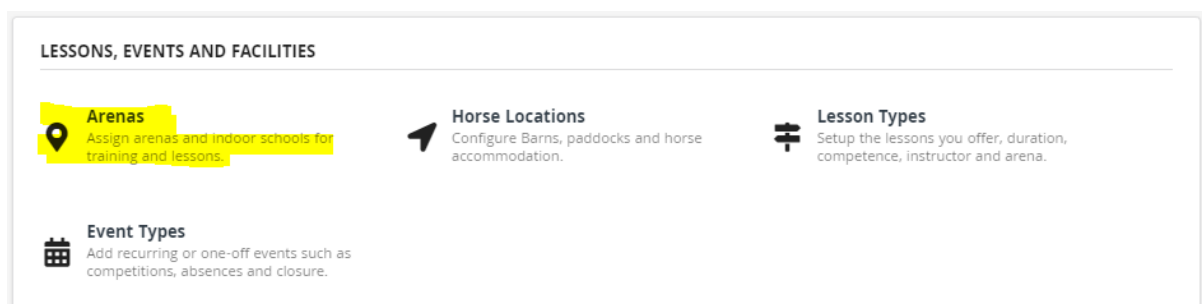
- User Name ***: A text input field containing "jessica@stablemaster.app".
- Password ***: A password input field with masked characters "*****".
- Role ***: A dropdown menu with the following options: "Select Role", "Owner", "Admin", and "Employee".
- BHS/ABRS/ORG member number**: A text input field with the placeholder "Member number".
- Qualification**: A text input field.
- Riding experience**: A text input field.

Username **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.

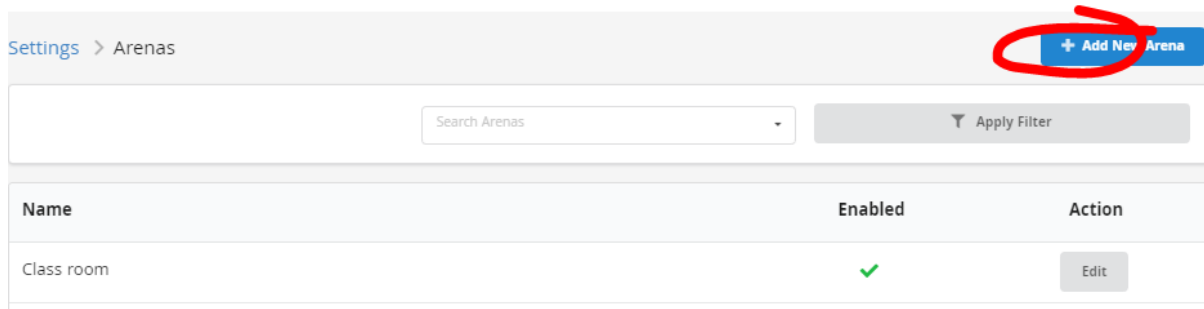
Adding Arenas, Paddocks and Training Facilities



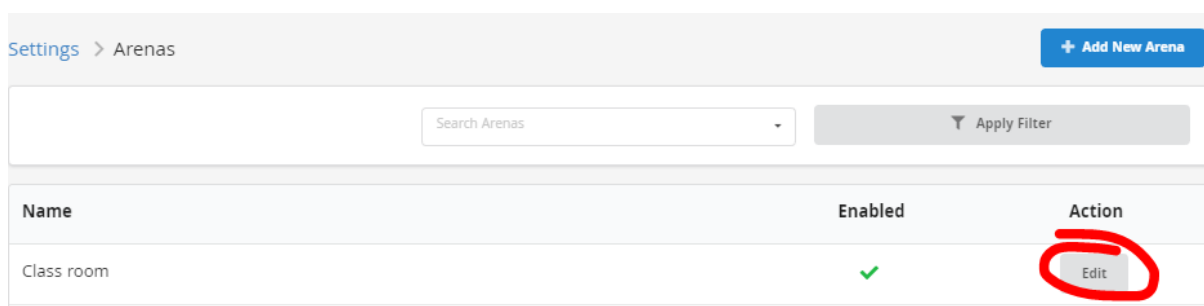
The screenshot shows a setup screen titled "LESSONS, EVENTS AND FACILITIES" with four main sections:

- Arenas**: Represented by a location pin icon. Description: "Assign arenas and indoor schools for training and lessons." (This section is highlighted in yellow in the original image).
- Horse Locations**: Represented by a location pin icon. Description: "Configure Barns, paddocks and horse accommodation."
- Lesson Types**: Represented by a list icon. Description: "Setup the lessons you offer, duration, competence, instructor and arena."
- Event Types**: Represented by a calendar icon. Description: "Add recurring or one-off events such as competitions, absences and closure."

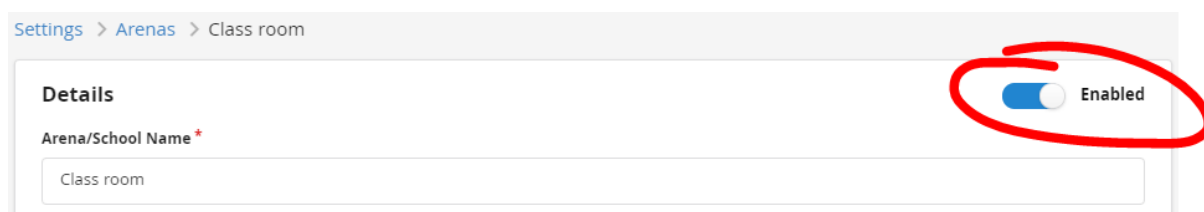
Setting up your Arenas creates bookable resources in the system, for example; a training paddocks; indoor arena, cross country course, classroom or meeting room. Basically, any resource you want to be able manage the availability of and allocate to lessons or events can be added here – just use your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



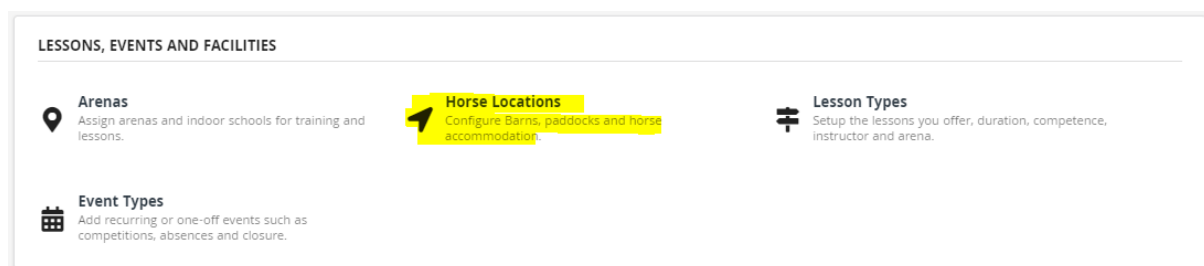
If for whatever reason you need to disable a bookable arena (for example if it is a classroom and it is being refurbished) simply disable it by, clicking on the **Edit** button, and...



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.

Settings > Horse Locations

Search Horse Locations

Apply Filter

Name	Capacity	Active	Action
The Line	4/6	✓	Edit
Crew Barn	4/6	✓	Edit
American Barn	4/6	✓	Edit
Bottom Paddock	1/10	✓	Edit

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.

Settings > Horse Locations > Crew Barn

Horse Location Details

Name *

Crew Barn

Capacity (max 10 horses) *

6

Description

Crew Barn. Smaller ponies tied up during the day and loose over night. Straw bed.

Horses

William

View

Ellie

View

Rufus

View


Toby


View


View All Horses


Creating and Configuring Lesson Types

LESSONS, EVENTS AND FACILITIES

**Arenas**
Assign arenas and indoor schools for training and lessons.

**Horse Locations**
Configure Barns, paddocks and horse accommodation.

**Lesson Types**
Setup the lessons you offer, duration, competence, instructor and arena.

**Event Types**
Add recurring or one-off events such as competitions, absences and closure.

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.

Settings > Lesson Types > Create

Lesson Type Details

Enabled

Name *

Minimum Riding Experience *

Max Riders *

Period in minutes *

On season adult cost *

Off season adult cost *

On season Child cost *

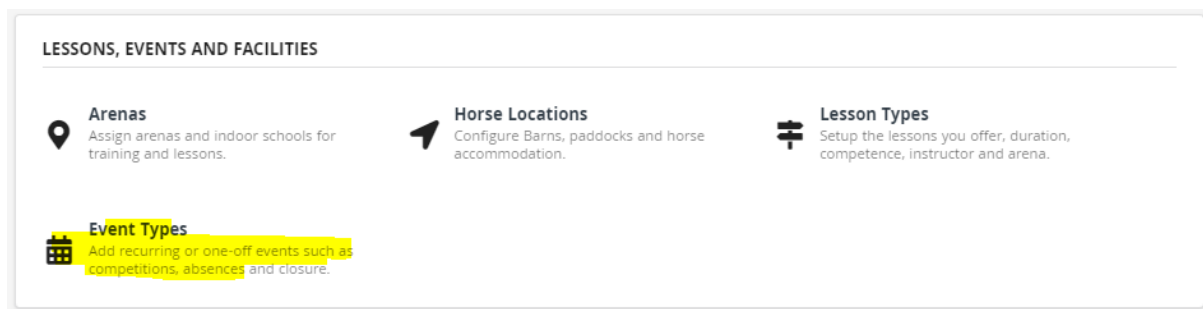
Off season Child cost *

Discard

Save

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



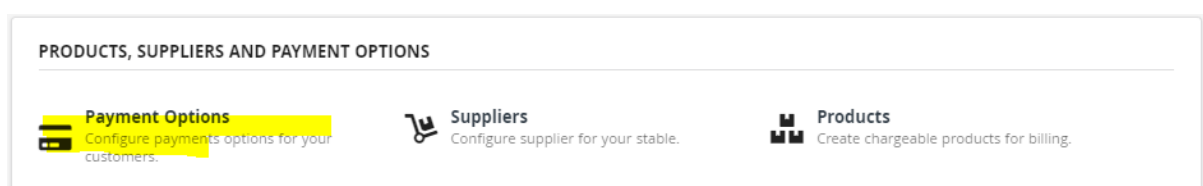
In StableMaster, events are considered one-off occurrences such as competitions, open days and absence. **It is important to understand that Events do not necessarily need to be related to horses or competitions for example. An event could be a member of staff going on holiday or a horse being laid off 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	<button>Edit</button>
Cash	Cash	✓	06-11-2018	06-11-2018	<button>Edit</button>
Credit Card	Card	✓	08-11-2018	08-11-2018	<button>Edit</button>
Debit Card	Card	✓	08-11-2018	08-11-2018	<button>Edit</button>
Online	Card	✓	15-01-2019	15-01-2019	<button>Edit</button>
PayPal	Wallet	✓	08-11-2018	08-11-2018	<button>Edit</button>
Voucher	Coupon	✓	08-11-2018	08-11-2018	<button>Edit</button>

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

Settings > Payment Options > Create

Payment Details

Payment Name *

Payment Type *

Choose Payment Type ▾

☒ Enabled

Discard

Save

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

Adding Suppliers

PRODUCTS, SUPPLIERS AND PAYMENT OPTIONS

Payment Options
 Configure payments options for your customers.

Suppliers
 Configure supplier for your stable

Products
 Create chargeable products for billing.

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.

Settings > Suppliers

+ Add New Supplier

Search Suppliers

Apply Filter

Name	Mobile Number	Type	Action
Argo Feeds	01226 762341	Feed	Edit
Battles	01522 529206	Equine Shop	Edit

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

Type*

Vet

Vet

Physio

Farrier

Farm Supplies

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

Settings > Products

+ Add New Product

Choose Products

Apply Filter

Name	Category	Cost	Enabled	Action
Arena Hire	Rental	£ 10.00	✓	Edit
Bespoke Service / Item	Other	£ 0.00	✓	Edit

Then enter the following detail

Settings > Products > Create

Product Details

Enabled

Name *

Arena Hire

Category *

- Entry Fee
- Entry Fee**
- Tack
- Rental
- Livery
- Other

Price *

£ 25

Discard **Save**

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

Arena Hire	--	1	0	0.00	
Choose Product	--	1	0	0.00	

No

- Arena Hire
- Bespoke Service / Item
- Boost Bar
- Custom Product
- DIY Livery
- Full Livery

Sub Total	28.00
Discount	£ 0

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

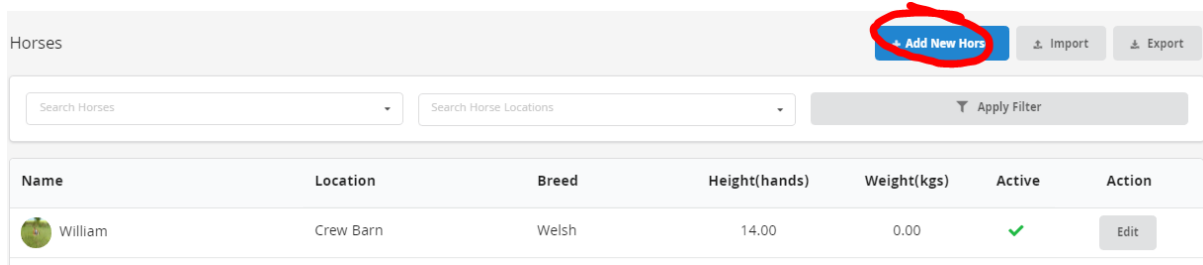
Stablemaster allows two ways for you to get your horse data into the system; manually or by uploading a spreadsheet. We will examine both options in this section, starting with the manual method first.



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.

A screenshot of the "Horses" management page. At the top right, there are three buttons: "Add New Horses" (circled in red), "Import", and "Export". Below these are two search bars: "Search Horses" and "Search Horse Locations", followed by an "Apply Filter" button. A table lists existing horses with columns: Name, Location, Breed, Height(hands), Weight(kgs), Active, and Action. One horse, "William", is listed with location "Crew Barn", breed "Welsh", height "14.00", weight "0.00", and an active status indicated by a green checkmark. An "Edit" button is next to the horse's name.

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.

A screenshot of the "Add New Horse" form. On the left is a large box labeled "Upload Photo" (circled in red). To the right, under the "Details" heading, are several input fields: "Name *" with the value "Flash", "Location" with the value "American Barn" (circled in red), "Height (in hands)" with the value "11", "Weight (in kgs)" with the value "320", "Date of birth" with the value "08-01-2003", and "Date of Purchase" with the value "19-09-2015". In the top right corner of the form, there is a toggle switch labeled "Enabled" (circled in red), which is currently turned on.

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).

Colouring <input type="text" value="Liver Chestnut"/>	Gender <input type="text" value="Mare"/>
Breed <input type="text" value="Warmblood"/>	Capacity (in kgs) <input type="text" value="127.00 kg 20.0 stone"/>
Abilities <input type="text" value="Jump, Hack, Gallop"/>	

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.

Horse Relations	
Type <input type="text" value="Private owned non livery"/>	Staff Carer <input type="text" value="David Smith"/>
Owner <input type="text" value="Mark Boult"/>	Notes <input type="text" value="Currently on FULL Livery tariff. Can be used for public lessons - owner permission granted"/>

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.

Passport		
Issue Date <input type="text" value="14-01-2018"/>	Identification Number <input type="text" value="123456789"/>	Microchip Number <input type="text" value="123456789"/>

Go ahead and enter Horse Passport and microchip information.

Suppliers		
Type <input type="text" value="Vet"/>	Name <input type="text" value="Choose Supplier"/>	<input type="button" value="Remove Supplier"/>
<input type="button" value="Add Supplier"/>	<input type="text" value="Hay Co"/>	

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.

Assessments	
<input type="button" value="Add Assessment"/>	<input type="button" value="View Assessments"/>

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.

Assessment

Assessment of horse

Ricky

Assessed by *

Jessica Boulton

Assessment Date

06-11-2018

Subject *

Initial Purchase Assessment

Description *

Good health, jittery around strangers but generally good temperament

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

Accidents

Add Accident View Accidents

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.

Horse Documents

Upload Documents

Discard Save

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.

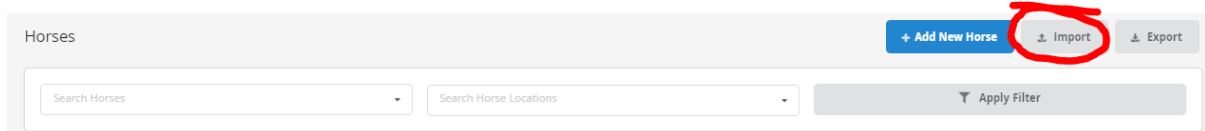
Adding your Horses using the Data Upload

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

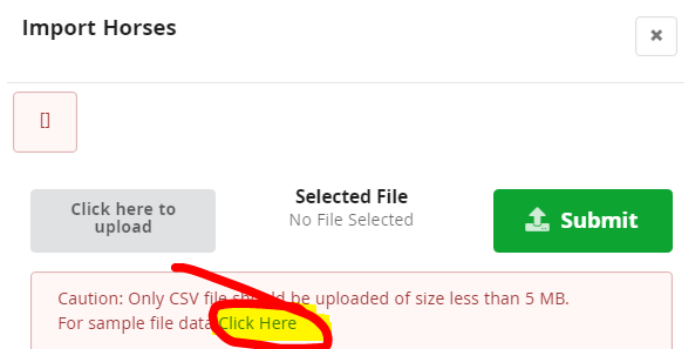
add your horses individually. To access this tool, click on the Horse menu icon.



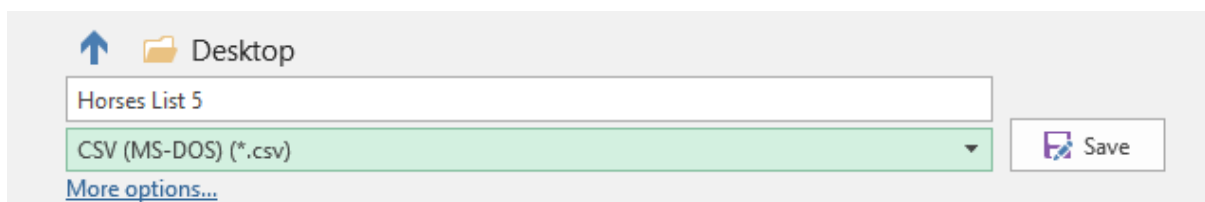
Then click on the Import button



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.

Import Horses



Click here to
upload

Selected File
test_horses.csv



Submit

Caution: Only CSV file should be uploaded of size less than 5 MB.
For sample file data [Click Here](#)

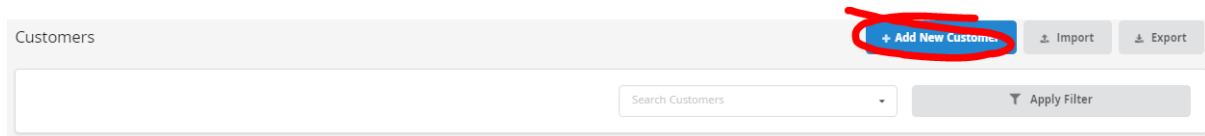
After a short delay, your horse data will appear in your horse list. If you have any problems in this process, then contact the StableMaster team via the usual routes.

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.

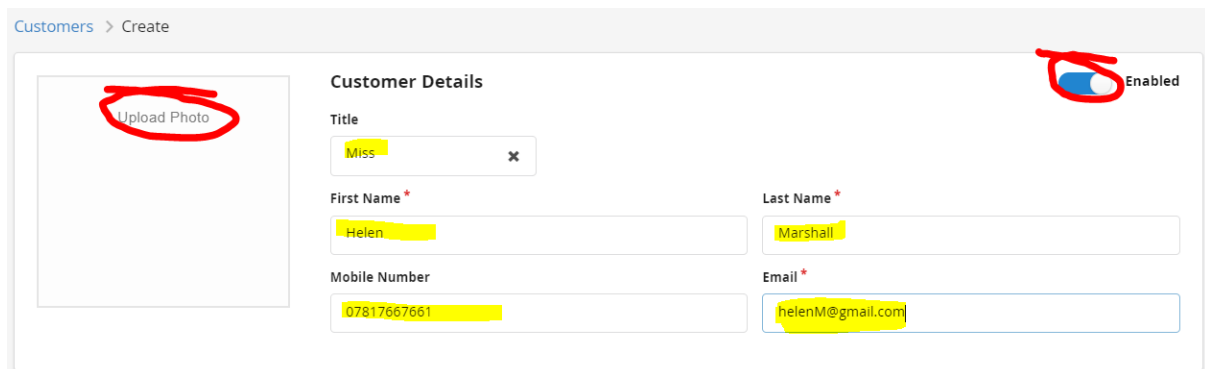
From the main StableMaster menu on the left of the screen, click in the **Customers** button.

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



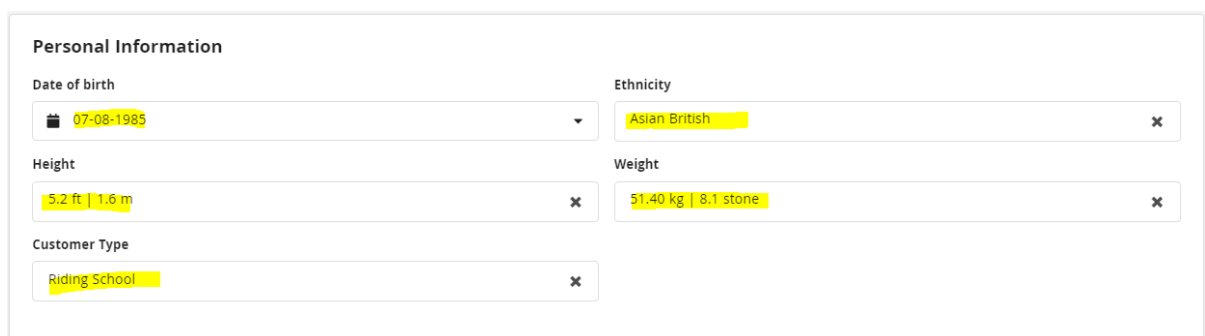
A screenshot of the 'Customers' page in the StableMaster application. At the top right, there are three buttons: '+ Add New Customer', 'Import', and 'Export'. The '+ Add New Customer' button is circled in red. Below these buttons is a search bar labeled 'Search Customers' and an 'Apply Filter' button.

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.



A screenshot of the 'Create' customer form. On the left, there is a placeholder for an 'Upload Photo' with a red circle around the text. To the right, under 'Customer Details', there are several fields: 'Title' (set to 'Miss'), 'First Name' (set to 'Helen'), 'Last Name' (set to 'Marshall'), 'Mobile Number' (set to '07817667661'), and 'Email' (set to 'helenM@gmail.com'). In the top right corner, there is a toggle switch labeled 'Enabled' which is currently turned on, also circled in red.

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



A screenshot of the 'Personal Information' section of the form. It contains several fields: 'Date of birth' (set to '07-08-1985'), 'Ethnicity' (set to 'Asian British'), 'Height' (set to '5.2 ft | 1.6 m'), 'Weight' (set to '51.40 kg | 8.1 stone'), and 'Customer Type' (set to 'Riding School'). Each field has a small 'x' icon to its right, likely for clearing the field.

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

Customer Address	
Street 1 22 Manor Grove	Street 2 Street 2
Street 3 Retford	County Notts
Postcode DN22 0FF	Country United Kingdom

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

Additional Information	
Emergency Contact Details June Marshall	Emergency Contact Number 07867 615211
Source Advertisement	Client Type Riding School
List any Medical Conditions None	Doctor Details Dr J Batsui, 01427 611427
Staff Notes Nervous around bigger horses	Horse Notes Prefers to ride Smudgel

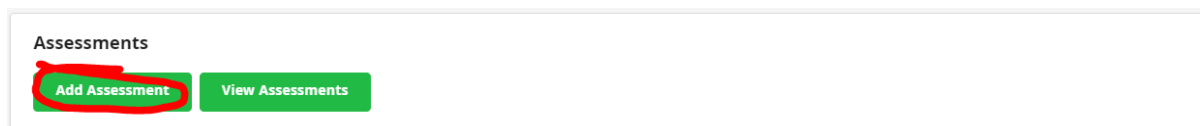
You have now completed the basic customer setup. Whilst you access the customer record you also have the option to add assign horses, add assessments, create accident reports and add/withdraw funds from the customers Wallet Balance. The next sections

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.

Horses
<div> Type William </div> <div>Remove Horse</div>
<div>Assign Horse to Customer</div>

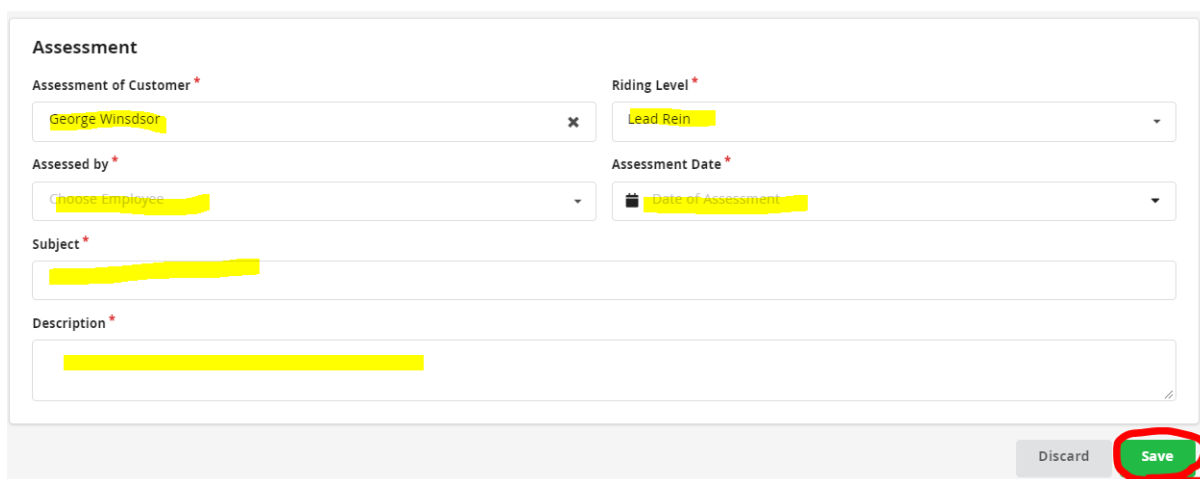
Customer Assessment Record

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.



The screenshot shows a header bar with the title "Assessments". Below the title are two green buttons: "Add Assessment" and "View Assessments". The "Add Assessment" button is circled in red.

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.



The screenshot shows the "Assessment" form. It contains several fields: "Assessment of Customer *" with a dropdown menu showing "George Windsor"; "Riding Level *" with a dropdown menu showing "Lead Rein"; "Assessed by *" with a dropdown menu showing "Choose Employee"; "Assessment Date *" with a calendar icon and a dropdown menu showing "Date of Assessment"; "Subject *" with a text input field; and "Description *" with a text input field. At the bottom right of the form are two buttons: "Discard" and "Save". The "Save" button is circled in red.

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.



The screenshot shows a header bar with the title "Accidents". Below the title are two green buttons: "Add Accident" and "View Accidents". The "Add Accident" button is circled in red.

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.

Accident Report

Report No. *

Accident report number

Rider

George Windsor

Horse

Search Horses

Instructor

Choose Instructor

Place

Choose Arena

Date of Accident *

09:00

Time of Accident *

Description

Sample Content

- Describe in detail what happened
- where did the accident occur exactly
- were there external factors that may have caused or added to this incident
- what action was taken to make the scene safe for other customers
- were there any obvious injuries to the rider/s
- was any medical assistance given

Conclusion

Discard Save

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.

Credits Management (Current Balance: £ 125.00)

Add Deposit/Withdraw View Deposits/Withdrawals

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.

New Receipt

Customer Name *

George Winsdor

Payment Mode *

Bank Transfer

Transaction Type *

Deposit

Amount *

£ 234.00

Notes

10 x Lesson @ £26.00 Prepayment, with 10% discount added.

Discard

Save

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

Customers

+ Add New Customer

Import

Export

Search Customers

Apply Filter

Name	Type	Mobile	Wallet Balance	Active	Action
George Winsdor	Riding School	0786554111	£ 359.00	✓	Edit

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

PRODUCTS

Product	Horse	Quantity	Price	Amount	
Custom Product	--	1	23.4	23.40	

+ Add New Product

Notes

Redemption of 1 Lesson on Account

Payment Terms and Options

Invoices can be paid over the phone via Debit and Credit Card.

Bank Transfer

Bank:
Account Name:
Bank Account:
Sort Code:
IBAN:

Paypal

Sub Total	23.40
Discount	£ 0
Tax 0 %	0.00
Total	£ 23.40
On Account	£ 23.40
+ Add New Payment	
Balance Due	£ 0.00

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:

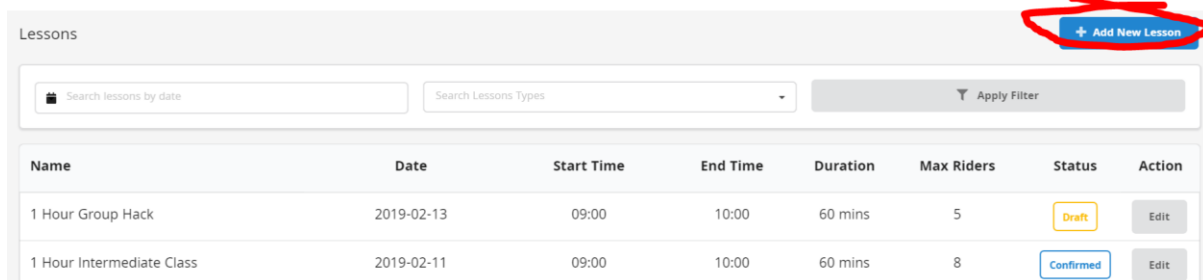
- Lesson Name
- An assigned Lesson Type
- A date and a start/finish time
- Lesson cost
- Lesson Riding Level (what required skill is required)
- Maximum Riders
- An Instructor
- A location (i.e. an Arena or course)
- Assigned Horses
- Assigned riders (customers)

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.



The screenshot shows the 'Lessons' management interface. At the top right, there is a blue button labeled '+ Add New Lesson' which is circled in red. Below this is a search bar with 'Search lessons by date' and a dropdown for 'Search Lessons Types', followed by an 'Apply Filter' button. The main part of the interface is a table with the following columns: Name, Date, Start Time, End Time, Duration, Max Riders, Status, and Action.

Name	Date	Start Time	End Time	Duration	Max Riders	Status	Action
1 Hour Group Hack	2019-02-13	09:00	10:00	60 mins	5	Draft	Edit
1 Hour Intermediate Class	2019-02-11	09:00	10:00	60 mins	8	Confirmed	Edit

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.

Lessons > Create

Date * 2019-02-05	Lesson Type * Choose Lesson Type
Start Time * 09:15	End Time 10:00
Instructor Choose Instructor	Arena Choose Arena
Notes 	

Discard Save

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.

Lessons > Create

1 Hour Beginner Class Draft Riding Experience: Beginner

Duration: 60 minutes Riders: 0/8

Date * 2019-02-05	Lesson Type * 1 Hour Beginner Class
Start Time * 09:15	End Time 10:15
Instructor Choose Instructor	Arena Choose Arena
Notes 	

Discard Save

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 must alter the duration by editing the lesson type via settings.

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

Lessons > Create

1 Hour Beginner Class Draft Riding Experience: Beginner

Duration: 60 minutes Riders: 0/8

Date: 2019-02-05 Lesson Type: 1 Hour Beginner Class

Start Time: 09:15 End Time: 10:15

Instructor: David Smith (selected) Ian Hughes Jack Smith Jane Jones Jenny Jones Jessica Boulton

Arena: Choose Arena

Discard Save

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.

Lessons > 1 Hour Beginner Class

1 Hour Beginner Class Draft

Riding Experience: Beginner

Duration: 60 minutes Riders: 0/8

Date* 2019-02-05 Lesson Type* 1 Hour Beginner Class ✕

Start Time* 09:15 ✕ End Time 10:15

Instructor David Smith ✕ Arena Cross Country Course ✕

Assign Riders and Horses

Rider* Horse* + Add

Choose Rider Choose Horse

ASSIGNED RIDERS & HORSES

No Riders & Horses assigned

Notes

Cancel Discard Save Confirm

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.

1 Hour Beginner Class

Draft

Riding Experience: Beginner

Duration: 60 minutes

Riders: 2/8

Date *

2019-02-05

Lesson Type *

1 Hour Beginner Class

Start Time *

09:15

End Time

10:15

Instructor

David Smith

Arena

Cross Country Course

Assign Riders and Horses

Rider *

Choose Rider

Horse *

Choose Horse

+ Add

ASSIGNED RIDERS & HORSES

Rider	Horse	Invoice	Action
<div>Mark Boulton</div> <div>Height: 1.9 in m Weight: 12 in st.</div> <div></div>	<div>Star2 c: 0 kgs</div>	<div>Raise Invoice</div>	<div></div>
<div>William George</div> <div>Height: 0 in m Weight: 0 in st.</div> <div></div>	<div>Lucy c: 90 kgs</div>	<div>Raise Invoice</div>	<div></div>

Notes

Cancel

Discard

Save

Confirm

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.

Lesson Confirmation

Confirming this lesson would confirm all the riders for this lesson, Are you sure you want to Confirm this lesson?

Warning: This action be undone

Yes

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.

RECURRENCE

Once Daily Weekly Monthly

Repeat On *

2019-02-13

☐ Include Horses & Riders

☐ Include Instructor

Repeat

Cancel Discard Save Complete

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.

RECURRENCE

Once Daily Weekly Monthly

☒ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday

From * To *

2019-02-11 2019-03-04

☒ Include Horses & Riders
















☒ Include Instructor

Repeat

Cancel Discard Save Complete

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.

ASSIGNED RIDERS & HORSES			
Rider	Horse	Invoice	Action
 George Winsdor Height: 0.7 in m Weight: 1.5 in st.   	Bertie c: 14.2 kgs <div></div>	Raise Invoice	Mark as complete 
 Katie Jones Height: 0.9 in m Weight: 1.2 in st.   	Bee c: 80 kgs <div></div>	Raise Invoice	Mark as complete 
 Jeanie Drakett <div>Failed to repeat this lesson with this Rider, as he/she is already assigned to other events or lessons for same date or time; Try repeating the lesson without rider</div> Height: 0.6 in m Weight: 2.4 in st.   	Jelly Tot c: 0 kgs <div>Failed to repeat this lesson with this Horse, as he/she is already assigned to other events or lessons for same date or time; Try repeating the lesson without rider</div>	Raise Invoice	Mark as complete 

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.

Duration: 60 minutes

Riders: 2/5

Date

2019-01-29

Lesson Type *

1 Hour Group Hack

Start Time

09:00

End Time

10:00

Instructor

Jenny Jones

Arena

Cross Country Course

Assign Riders and Horses

Rider *

Choose Rider

Horse *

Choose Horse

+ Add

ASSIGNED RIDERS & HORSES

Rider	Horse	Invoice	Action
<div>George Winsdor</div> <div>Height: 0.7 in m Weight: 1.5 in st.</div> <div></div>	Bertie c: 14.2 kgs	Raise Invoice	<div>Mark as complete</div> <div></div>
<div>Katie Jones</div> <div>Height: 0.9 in m Weight: 1.2 in st.</div> <div></div>	Bee c: 80 kgs	Raise Invoice	<div>Mark as complete</div> <div></div>

CANCELLED RIDERS

Rider	Horse	Cancellation Reason	Status
-------	-------	---------------------	--------

Notes

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.

Duration: 60 minutes

Riders: 2/5

Date

2019-01-29

Lesson Type *

1 Hour Group Hack

Start Time

09:00

End Time

10:00

Instructor

Jenny Jones

Arena

Cross Country Course

Assign Riders and Horses

Rider *

Choose Rider

Horse *

Choose Horse

+ Add

ASSIGNED RIDERS & HORSES

Rider	Horse	Invoice	Action
<div>George Winsdor</div> <div>Height: 0.7 in m Weight: 1.5 in st.</div> <div></div>	Bertie c: 14.2 kgs	Raise Invoice	<div>✓</div> <div></div>
<div>Katie Jones</div> <div>Height: 0.9 in m Weight: 1.2 in st.</div> <div></div>	Bee c: 80 kgs	Raise Invoice	<div>✓</div> <div></div>

CANCELLED RIDERS

Rider	Horse	Cancellation Reason	Status
-------	-------	---------------------	--------

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.

Rider	Horse	Invoice	Action
<div>George Winsdor</div> <div>Height: 0.7 in m Weight: 1.5 in st.</div> <div></div>	Bertie c: 14.2 kgs	INV1016	<div>✓</div> <div></div>
<div>Katie Jones</div> <div>Height: 0.9 in m Weight: 1.2 in st.</div> <div></div>	Bee c: 80 kgs	Raise Invoice	<div>✓</div> <div></div>

CANCELLED RIDERS

Rider	Horse	Cancellation Reason	Status
-------	-------	---------------------	--------

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.

INV1016

Customer

George Windsor

Wallet Balance

£ 359.00

Invoice Date

06-02-2019

Created by *

Ian Hughes

×

Open

PRODUCTS

Product	Horse	Quantity	Price	Amount	
<div>1 Hour Group Hack</div> <div>Note</div> <div> <div>Lesson Price</div> <div>Adult: £ 25.00 £ 23.00</div> <div>Child: £ 21.00 £ 21.00</div> </div>	Bertie	1.00	23	23.00	

+ Add New Product

Notes

Payment Terms and Options

Invoices can be paid over the phone via Debit and Credit Card.

Bank Transfer

Bank: Barclays Bank

Account Name: 14317560

Bank Account: 14317560

Sort Code: 601728

IBAN:

Paypal

acme@paypal.com

Sub Total	23.00
Discount	£ 0
Tax 0 %	0.00
Total	£ 23.00

+ Add New Payment

Balance Due	£ 23.00
-------------	---------

Void

Discard

Save

Complete

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

Product	Horse	Quantity	Price	Amount	
1 Hour Group Hack <input type="text" value="Note"/> Lesson Price Adult: £ 25.00 £ 23.00 Child: £ 21.00 £ 21.00	Bertie	1.00	<input type="text" value="23"/>	23.00	
<div>Choose Product</div> <ul style="list-style-type: none"> Arena Hire Bespoke Service / Item Boost Bar Custom Product DIY Livery Full Livery Non-ridden Schooling Packed Lunch 	--	<input type="text" value="1"/>	<input type="text" value="0"/>	0.00	

Sub Total 23.00

Discount £ 0

Tax % 0.00

Pe
Invoices can be paid over the phone via Debit and Credit Card.

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.

Product	Horse	Quantity	Price	Amount	
1 Hour Group Hack <input type="text" value="Note"/> Lesson Price Adult: £ 25.00 £ 23.00 Child: £ 21.00 £ 21.00	Bertie	1.00	<input type="text" value="23"/>	23.00	
<div>Packed Lunch</div>	--	<input type="text" value="1"/>	<input type="text" value="3.5"/>	3.50	

[+ Add New Product](#)

Notes

Payment Terms and Options

Invoices can be paid over the phone via Debit and Credit Card.

Bank Transfer

Bank: Barclays Bank
 Account Name: 14317560
 Bank Account: 14317560
 Sort Code: 601728
 IBAN:

Paypal

acme@paypal.com

Sub Total	26.50
Discount	£ 0
Tax <input type="text" value="0"/> %	0.00
Total	£ 26.50
+ Add New Payment	
Balance Due	£ 26.50

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.

Notes

Payment Terms and Options

Invoices can be paid over the phone via Debit and Credit Card.

Bank Transfer

Bank: Barclays Bank
Account Name: 14317560
Bank Account: 14317560
Sort Code: 601728
IBAN:

Paypal

acme@paypal.com

Sub Total	26.50
Discount	£ 0
Tax 0 %	0.00
Total	£ 26.50
Choose Payment	£ 0
+ Add New Payment	
Balance Due	£ 26.50

Void

Discard

Save

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.

Sub Total	26.50
Discount	£ 0
Tax 0 %	0.00
Total	£ 26.50
Choose Payment	£ 0
Bank Transfer	
Cash	
Credit Card	
Debit Card	
On Account	
Online	
PayPal	
Voucher	

Discard

Save

Complete

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.

Sub Total	26.50	
Discount	<input type="text" value="£ 0"/>	
Tax <input type="text" value="0"/> %	0.00	
Total	£ 26.50	
<input type="text" value="On Account"/> <input type="button" value="x"/>	<input type="text" value="£ 13.25"/>	<input type="button" value="🗑"/>
<input type="text" value="Debit Card"/> <input type="button" value="x"/>	<input type="text" value="£ 13.25"/>	<input type="button" value="🗑"/>
<input type="button" value="+ Add New Payment"/>		
Balance Due	£ 0.00	

Once you have completed the payment you then need to click complete to mark the invoice as 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 the 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.



Tasks						+ Add New Task
<div><div> Ian Hughes ×</div><div>Search Priorities</div><div>Search Statuses</div><div>Apply Filter</div></div>						
Priority	Subject	Assigned to		Due by	Status	Action
Low	Task Repeat		Ian Hughes	2019-01-14 17:00	Draft	Update
Low	Task Repeat		Ian Hughes	2019-01-15 17:00	Draft	Update
Low	Task Repeat		Ian Hughes	2019-01-16 17:00	Draft	Update

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 has 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.

Tasks

+ Add New Task

Search Employees Search Priorities Search Statuses Apply Filter

Priority	Subject	Assigned to	Due by	Status	Action
----------	---------	-------------	--------	--------	--------

Once clicked, the create new task screen below appears.

Tasks > Create

Task

Due by * 2019-02-18 **Due Time *** 17:00

Assigned to * Carol Decker **Priority *** Normal

Subject * Weekly Tack Inspection

Description
Hi Carole, can you ensure all tack cleaned and inspected please prior to each week activities.
Thanks,
Jenny

Discard **Save**

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 is 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.

Task

Status: Draft

Due by *

2019-02-18

Due Time *

17:00

Assigned to *

Carol Decker

Priority *

Normal

Subject *

Weekly Tack Inspection

Description

Hi Carole, can you ensure all tack cleaned and inspected please prior to each week activities.
Thanks.
Jenny

Cancel

Discard

Save

Assign

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 is 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.

Task

Status: Assigned

Due by *

2019-02-18

Due Time *

17:00

Assigned to *

Carol Decker

Priority *

Normal

Assigned by

Jenny Jones

Assigned on

14-02-2019 14:41

Subject *

Weekly Tack Inspection

Description

Hi Carole, can you ensure all tack cleaned and inspected please prior to each week activities.
Thanks.
Jenny

RECURRENCE

Once

Daily

Weekly

Monthly

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

From *

2019-02-18

To *

2019-03-07

Repeat

Cancel

Discard

Save

Start

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.

Carol Decker x		Search Priorities	Search Statuses	Apply Filter	
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.

Task Status: **Assigned**

Due by * **Due Time ***

Assigned to * **Priority ***

Assigned by **Assigned on**

Subject *

Description

RECURRENCE

Once	Daily	Weekly	Monthly
------	-------	--------	---------

Repeat On *

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

Task Status: **Started**

Due by **Due Time**

Assigned to **Priority**

Assigned by **Assigned on**

Subject *

Description

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

Task

Status: **Completed**

Due by
2019-02-18

Due Time
17:00

Assigned to
Carol Decker

Priority
Normal

Assigned by
Jenny Jones

Assigned on
14-02-2019 14:41

Subject
Weekly Tack Inspection

Description
Hi Carole, can you ensure all tack cleaned and inspected please prior to each week activities.Thanks,Jenny

Discard

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.

Search Employees		Search Priorities	Search Statuses	Apply Filter	
<ul style="list-style-type: none"> Carol Decker Fred Bloggs Jenny Jones 					
		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

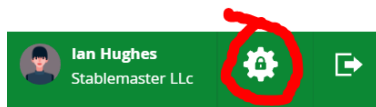
But they could also include:

- Staff Holiday
- Horse Layoff
- Arena or course closure

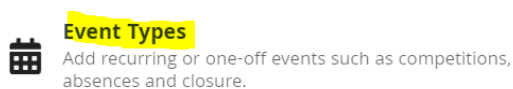
We encourage you to explore the uses of events and apply them in the context of your operation setup. Lets deep-dive into events. In the next pages we will:

- 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	✓	<button>Edit</button>
Horse Absence	0	£ 0.00	£ 0.00	✓	<button>Edit</button>
Pony Showing	10	£ 0.20	£ 0.10	✓	<button>Edit</button>
Show Jumping Competition	30	£ 1,500.00	£ 1,100.00	✓	<button>Edit</button>

The following screen will appear

Event Type Details

Enabled

Name *

Under 12's Jumping Competition

Minimum Riding Experience *

Learning to jump

×

Max Participants *

10

Full cost *

£ 5

Discounted cost *

£ 5

Summary

Events for all current riders of age 12 and under. Will be held in Bottom Arena 12th May 2019.

Discard

Save

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**.



Events

+ Add New Event

Search events by date

Search Event Types

Apply Filter

Name	Date	Start Time	End Time	Max Participants	Status	Action
Dressage Competition	2018-10-03	17:00	11:00	0	Completed	View
Pony Showing	2018-09-26	10:30	13:30	10	Completed	View

The following screen will appear

Date *

2019-02-18

Start Time *

13:00

×

Instructor

Choose Instructor

Event Type *

Choose Event Type

Dressage Competition

Horse Absence

Pony Showing

Show Jumping Competition

Under 12's Jumping Competition

Event Results

Discard

Save

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)

Under 12's Jumping Competition

Draft

Riding Experience: Learning to Jump

Riders: 0/10

Date *
2019-05-12

Event Type *
Under 12's Jumping Competition

Start Time *
08:30

End Time *
19:30

Instructor
Jessica Oades

Arena
Jumping Arena

Event Results

Discard Save

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 maximum 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**.

Under 12's Jumping Competition

Draft

Riding Experience: Learning to Jump

Riders: 0/10

Date *
2019-05-12

Event Type *
Under 12's Jumping Competition

Start Time *
08:30

End Time *
19:30

Instructor
Jessica Oades

Arena
Jumping Arena

Assign Riders and Horses

Rider *
Search Customers

Horse *
Search Horses

+ Add

ASSIGNED RIDERS & HORSES

No Riders & Horses assigned

Event Results

Cancel Discard Save Confirm

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.

Assign Riders and Horses

Rider *











Horse *

Search Customers

Search Horses

+ Add






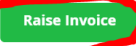


































ASSIGNED RIDERS & HORSES

Rider	Horse	Invoice	Action
<div> Ali Babab</div> <div>Height: 0.9 <i>in m</i> Weight: 1.2 <i>in st.</i></div> <div>  </div>	<div>Ricky c: 8 kgs</div>	<div>Raise Invoice</div>	<div>Mark as complete</div> <div></div>
<div> Fred Hughes</div> <div>Height: 0.6 <i>in m</i> Weight: 1.2 <i>in st.</i></div> <div>  </div>	<div>Jelly Tot c: 0 kgs</div>	<div>Raise Invoice</div>	<div>Mark as complete</div> <div></div>






CANCELLED RIDERS

Rider	Horse	Cancellation Reason	Status
-------	-------	---------------------	--------

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 		 
 Helen Hall Height: 0 in m Weight: 0 in st.   	Bertie c: 0 kgs 		 
 Ali Babab Height: 0.9 in m Weight: 1.2 in st.   	Lucy c: 12 kgs 		 
 Minnie Smith Height: 0 in m Weight: 0 in st.   	Yogi c: 0 kgs 		 
 George Oades Height: 0 in m Weight: 0 in st.   	Rufus c: 0 kgs 		 









CANCELLED RIDERS

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

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 		 

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, let's work through some of the key detail on this invoice, working our way from the top down.

INV1039
Open

Customer
Fred Hughes
Wallet Balance
£ 84.79

Created by
 **Ian Hughes**

Invoice Date
18-02-2019

Product	Horse	Quantity	Price	Amount
Under 12's Jumping Competition <input type="text" value="Note"/>	Jelly Tot	1.00	<input type="text" value="5"/>	5.00

+ Add New Product

Notes

Payment Terms and Options
Invoices can be paid over the phone via Debit and Credit Card.

Bank Transfer
Bank:
Account Name:
Bank Account:
Sort Code:
IBAN:

Paypal

Sub Total	5.00
Discount	£ <input type="text" value="0"/>
Tax <input type="text" value="0"/> %	0.00
Total	£ 5.00
<div>+ Add New Payment</div>	
Balance Due	£ 5.00

Void

Discard

Save

Complete

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.

Bank Transfer

Cash 5.00

Credit Card

Debit Card

On Account

Online 0.00

PayPal £ 5.00

Voucher

Choose Payment £ 0

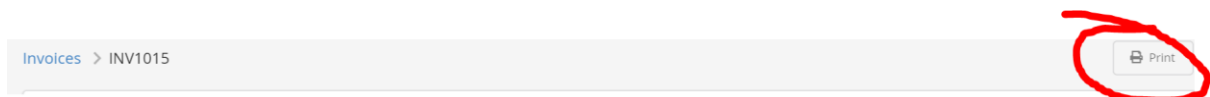
+ Add New Payment

Balance Due £ 5.00

Discard Save **Complete**

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.

Tasks

+ Add New Task

Search Employees Search Priorities Search Statuses Apply Filter

Assigned to	Due by	Status	Action
Ian Hughes	2019-01-14 17:00	Cancelled	View
Ian Hughes	2018-12-21 17:00	Completed	View
Ian Hughes	2018-12-19 17:00	Completed	View
Ian Hughes	2018-12-28 17:00	Completed	View

Search Employees

- David Smith
- Ian Hughes
- Jack Smith
- Jane Jones
- Jenny Jones
- Jessica Boulton

Events Usage

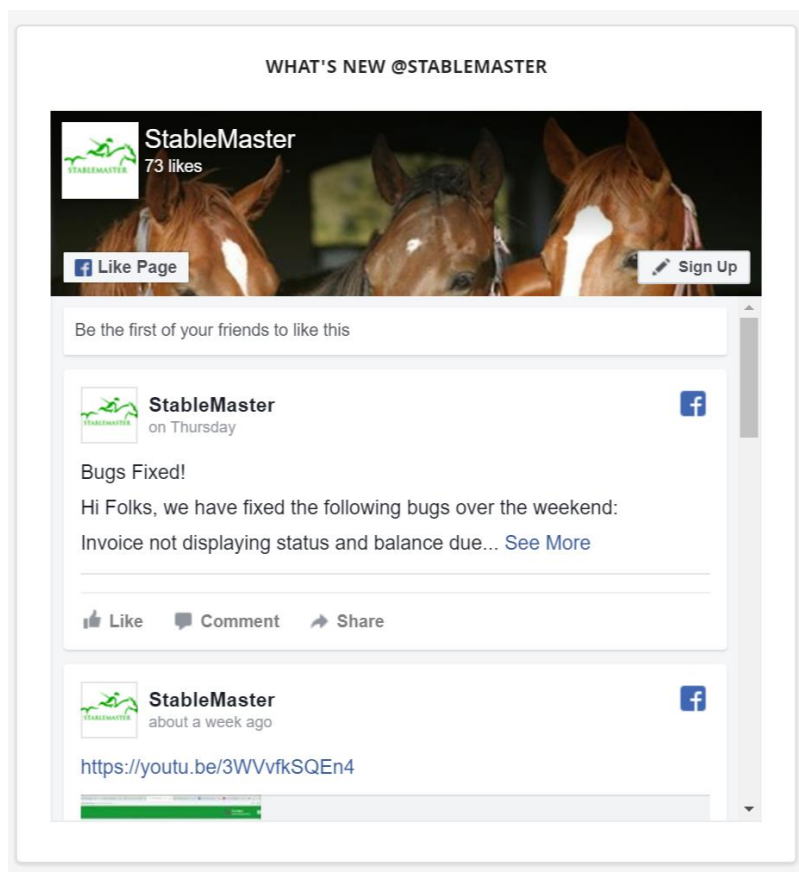
The Events function can be used to make specific resources unavailable for booking for a set period; for example, an instructor going on annual leave or a horse being laid off for a period of rest. We have published several videos on how to achieve this and they are available via our in-app Facebook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