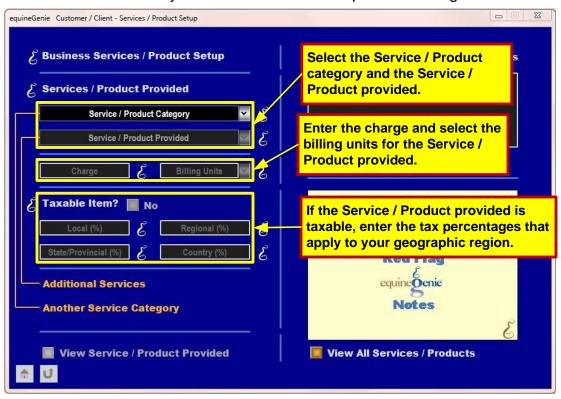# Services / Products Setup

The Services / Products Setup is used to identify the services or products a business provides to its customers. It is a one-time setup. A service or product can then be selected when entering line items on a Horse or Customer Billings Log. This saves considerable time when identifying charges (line items) that need to be billed to a customer. When a service or product is selected to be billed its category, service or product, charge and billing units are all automatically displayed on a billing log without having to be reentered.

If a service or product is taxable, the 'Taxable Item' button is selected and the applicable tax percentages are entered in the appropriate boxes. If a service or product is taxed equineGenie calculates the tax and automatically adds it to the service or products charge.
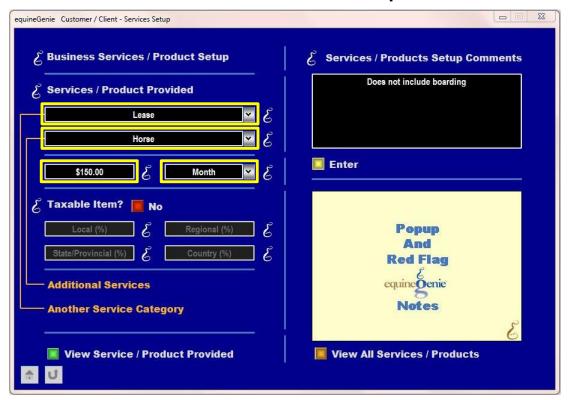

NOTE: There are many service or product categories in the 'Service / Product Category' dropdown. If a category is needed, but is not listed you can add a new category and equineGenie will remember it and add it to the list for future use.

NOTE: There are many services or products provided in each service or product category'. If a service or product is needed, but is not listed you can add a new service or product to any category and equineGenie will remember it and add it to the list for future use.
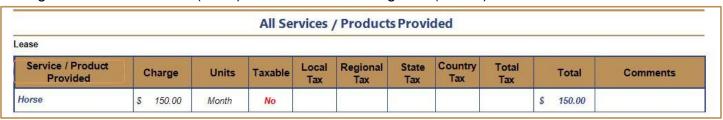
For example; In the Activities Category, the only services or products listed are Camps and Seminars. If the business provides riding lessons to children it may want to add Birthday Parties to the service or products it provides. If Birthday Parties are added equineGenie will remember it and add it to the 'Service / Product Provided' dropdown list.

NOTE: Any changes to the charge and or number of units on a billing log does not change the services or product charges originally setup.
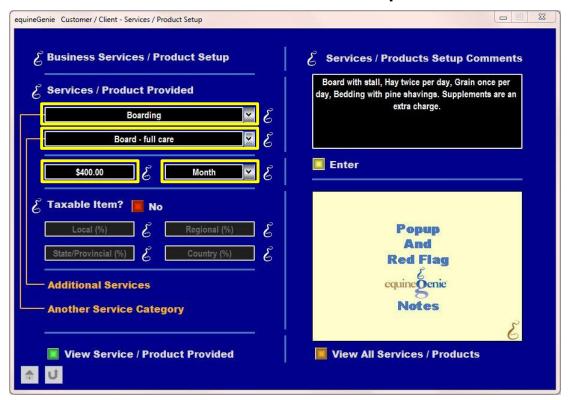
SUGGESTION: It may be a good idea to print and post the services / products your business provides. The comment section on the Services / Products Setup screen can be used to enter what is included in a service or product. Any comments are included in the Services / products report.

Services / Products Setup

equineGenie Customer / Client - Services Setup

Business Services / Product Setup

Services / Product Provided

- Lease
- Horse
- $150.00
- Month

Taxable Item? No

- Local (%)
- Regional (%)
- State/Provincial (%)
- Country (%)

Additional Services

Another Service Category

View Service / Product Provided

Services / Products Setup Comments

Does not include boarding

Enter

Popup And Red Flag equineGenie Notes

View All Services / Products

For Example: If the business leases horses and charges a customer monthly, The Lease Category would be selected, the Horse Service / Product Provided would be selected, the Lease Amount charged would be entered ($150) and the Month Billing Unit (Month) would be selected.

All Services / Products Provided

Lease

Service / Product Provided	Charge	Units	Taxable	Local Tax	Regional Tax	State Tax	Country Tax	Total Tax	Total	Comments
Horse	$ 150.00	Month	No						$ 150.00	

equineGenie Customer / Client - Customer Billing Log

Customer Billing Log

- Test Customer & Family
- Dixie
- 3/1/2013
- Lease
- Horse
- Annual Lease, Paid Monthly
- 4000 - 4999 Income
- 4590 - Horse Lease Income
- Dixie
- $150.00 — Month
- 1 — $150.00

Additional Services

Another Service Category

View Selected Customer Billing Logs

Customer Billing Log Comments

Annual Lease, Paid Monthly

Enter

Customer Billing Log with Horse Lease selected.
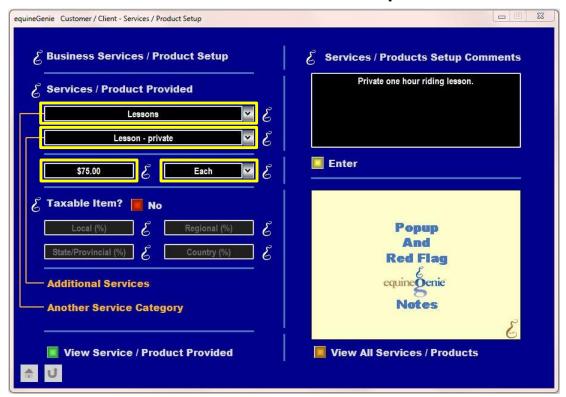
equineGenie Notes

Services / Products Setup

For Example: If the business boards horses and charges a customer monthly, The Boarding Category would be selected, the Horse Service / Product Provided would be selected, the Board Amount charged would be entered ($400) and the Month Billing Unit (Month) would be selected.

All Services / Products Provided

Boarding

Service / Product Provided	Charge	Units	Taxable	Local Tax	Regional Tax	State Tax	Country Tax	Total Tax	Total	Comments
Blanketing	$ 15.00	Month	No						$ 15.00	Nightly blanketing with customer furnished blanket. Blanket repairs are charged separately .
Board - day	$ 18.00	Day	No						$ 18.00	Board includes stall, Hay twice per day, Bedding with pine shavings.
Board - full care	$ 400.00	Month	No						$ 400.00	Board with stall, Hay twice per day, Grain once per day, Bedding with pine shavings . Supplements are an extra charge.

Boarding Services Report with comments.

NOTE: The comments can be used to explain what is provided with a service or product so there is not misunderstanding.
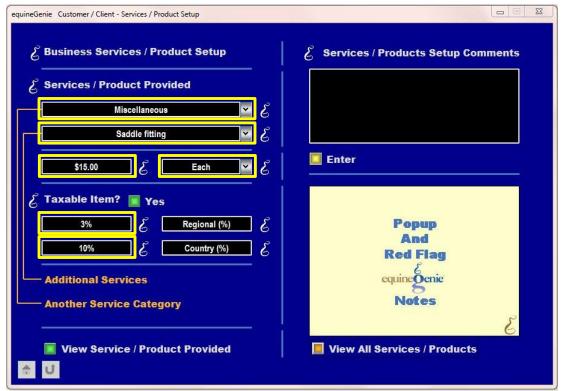
Services / Products Setup

For Example: If the business provides private riding lessons and charges a for each lesson, The Lesson Category would be selected, the Lesson Service / Product Provided would be selected, the Lesson Amount charged would be entered ($75) and the Billing Unit (Each) would be selected.

NOTE: A new Lesson Service / Product Provided could be add to your system that includes the comment. For example: Lesson – Private (1 hour)

All Services / Products Provided

Lessons

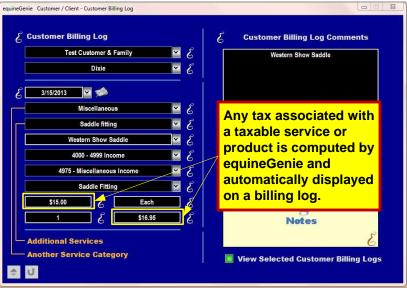| Service / Product Provided	Charge	Units	Taxable	Local Tax	Regional Tax	State Tax	Country Tax	Total Tax	Total	Comments
Lesson - private	$ 75.00	Each	No						$ 75.00	Private one hour riding lesson.
Lesson - Private (1 hour)	$ 75.00	Each	No						$ 75.00	Private one hour riding lesson.

Services / Products Setup

For Example: If the business provides Saddle Fitting and charges a for each fitting, The Miscellaneous Category would be selected, the Saddle fitting Service / Product Provided would be selected, the Saddle Fitting Amount charged would be entered ($15) and the Billing Unit (Each) would be selected.

If this service is taxable, the tax percentage for the appropriate government taxing authority would be enter. Local (%) (3%) and State/Provincial (%) (10%) in this example.

NOTE: equineGenie automatically calculates the tax amounts from the tax percentages entered.

All Services / Products Provided

Miscellaneous

Service / Product Provided	Charge	Units	Taxable	Local Tax	Regional Tax	State Tax	Country Tax	Total Tax	Total	Comments
Saddle fitting	$ 15.00	Each	Yes	$ 0.45		$ 1.50		$ 1.95	$ 16.95	