

Task Index

**Additional features
New for Version 4.0!*

Before During After

	Before	During	After
Boarding			
Generate carbon copies of letters to boarding locations.....	✓		
Generate shipping schedules by boarding location.....	✓		
Track boarding location.....	✓		
Breeding			
Store breeding of each entry.....	✓	✓	
Track reproductive history of broodmares.....	✓	✓	
Client			
*Add e-mail and web site to client record.....	✓	✓	✓
*Export clients to Excel for mail merge.....	✓		✓
Store address/phone data for each client.....	✓	✓	✓
Store special commission rate for each client.....			✓
Commission			
Assign different commission rates to partners on the same horse.....			✓
Calculate auctioneer commission.....			✓
Calculate commission at a special rate for a client or hip.....			✓
Calculate commission on a sliding scale (based on \$ amount consigned).....			✓
Calculate consignor commission.....			✓
Calculate RNA commission based on % of RNA price or as fixed amount.....			✓
Employees			
Calculate pay.....		✓	✓
Schedule employee dates, positions & barn.....	✓	✓	
Store employee information (Address, SSN, Phone, etc.....)	✓	✓	✓
Entry Fee			
Distribute proceeds based on partners who pay/don't pay share of entry fee.....			✓
Generate Invoice for Entry Fee due.....	✓		
Generate report for Entry Fee Outstanding.....	✓		
Track entry fee paid by client.....	✓		✓
Expenses .			
Apply expenses to all hips with just one entry.....			✓
Generate detailed report of all expenses.....			✓
Split expenses based on partnership percentages.....			✓
Inspection			
Generate list of hips to be inspected by Auctioneer select sales.....	✓		
Store inspection history for each hip.....	✓		
Letters			
Create letters to clients with due dates.....	✓		
Create letters to clients with hip information.....	✓		
Create letters to employees with pay summary.....		✓	✓
Create letters to employees with work schedule.....	✓		
Generate letters to purchasers.....			✓
Print envelopes and labels.....	✓		

Liens

Submit expenses to auctioneer on horses with liens prior to proceeds.....			✓
Track horses with liens.....			✓

Paperwork

*Ability to add additional notes for each entry.....	✓		✓
*Summary status report for all paperwork by boarding location.....	✓		
*Summary status report for all paperwork by owner.....	✓		
Track Authorization to Consign forms.....	✓		
Track Breeders' Cup nominations.....	✓		
Track Coggins information.....	✓		
Track EVA information.....	✓		
Track health certificates.....	✓		
Track Jockey Club information.....	✓		
Track KTDF information.....	✓		
Track Stallion certificates.....	✓		

Purchaser

*Export purchasers to Excel for mail merge.....	✓		✓
Generate letters to purchasers.....			✓
*Generate Purchaser History Reports.....			✓
Store purchaser information for each hip.....			✓

Sale

Calculate estimated show time for each hip.....			✓
Generate desired sale date "wish list" for auctioneer.....	✓		
Generate detailed itinerary for each sale day.....	✓	✓	
*Import entries from Keeneland's On Line entry program.....	✓		
Print forms for medication given at the sale.....			✓
Print forms for vet exams done at the sale.....			✓
Print stall layout for each barn.....			✓
Store Sale barn.....	✓	✓	
Track hips by property line (Agent XII, etc.).....	✓	✓	
Track hips by sale date.....	✓	✓	
**Track multiple nominations and entries for each hip without duplicate data entry.....	✓		
Track sales price averages (mean, median, high, low) by sale date.....		✓	✓

Sales Proceeds

Deduct non-sale related expenses (e.g. past due board) from proceeds.....			✓
Easily balance to Auctioneer's totals.....			✓
Generate client statement detailing proceeds.....			✓

Shipping

Calculate board expense based on shipping schedules.....			✓
Create shipping schedules with owner information for van company.....	✓		
Generate shipping schedules by boarding location.....	✓		
Print Arrival/Departure form.....			✓