

Adding a person with Horses to your Location

Login: Feedlot Livestock Admin

If you would like further assistance on how to use Horse Records, feel free to contact us using the details below:

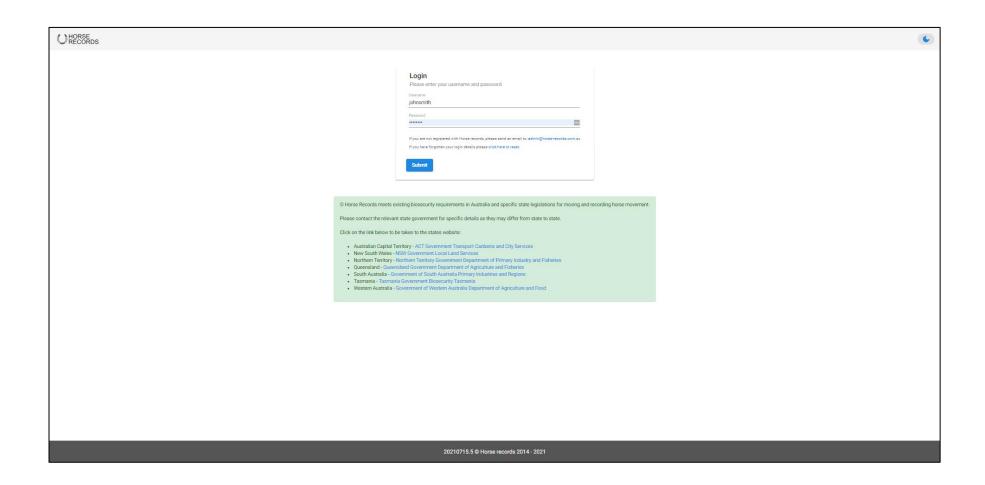
07 3038 1081 info@horse-records.com

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1. Login to Horse Records using your unique Horse Records Username and Passwords.





Adding a Person - Step 1: Click the People Tab

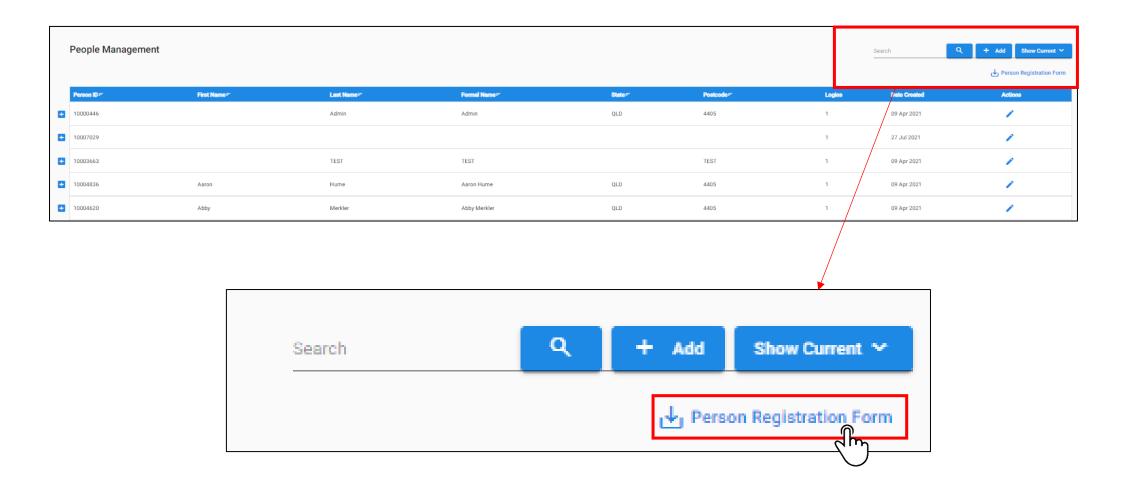
On the left-hand side, click the 'People' tab on the side bar panel.





Adding a Person - Step 2: Click the download button

In the top right-hand corner of the page of the people management tab, click the 'Person Registration Form' button.

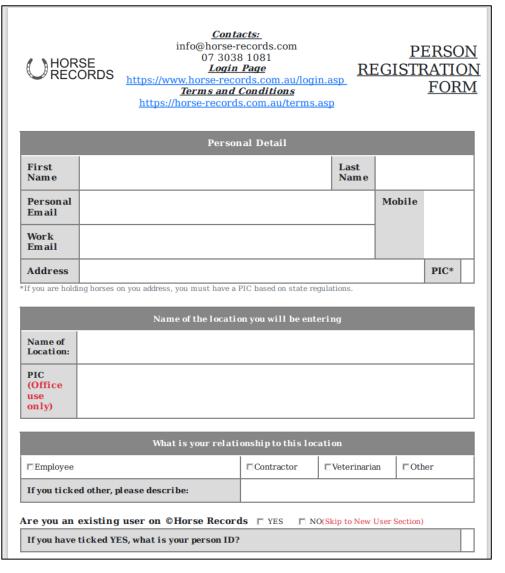




Adding a Person - Step 3: Downloading the person registration form

Once clicked, the PDF will automatically download which you can save or print.

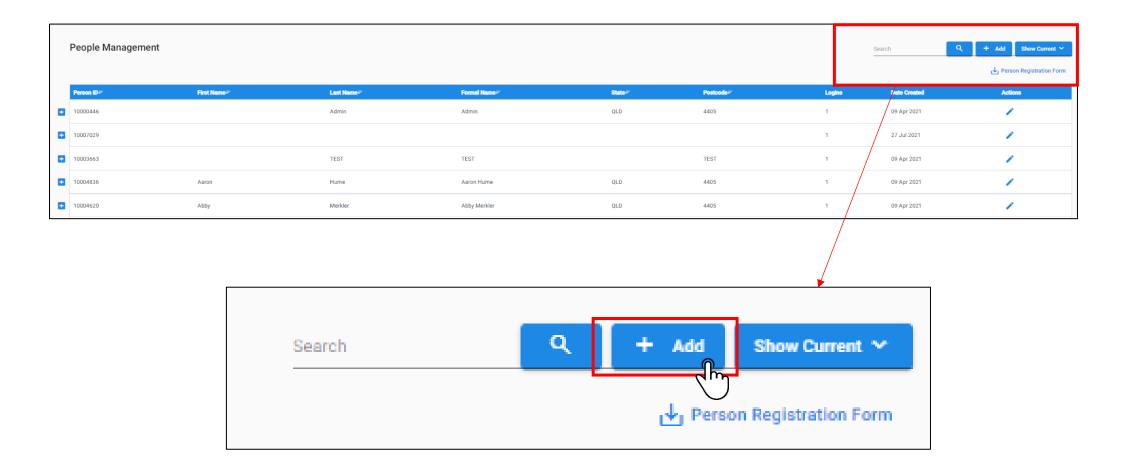
NOTE: It's important that the person enters all the details into the form so that feedlot livestock admin can fill in the information into horse records.





Adding a Person - Step 4: Starting the process

In the top right-hand corner of the page of the people management tab, click the 'Add' button.

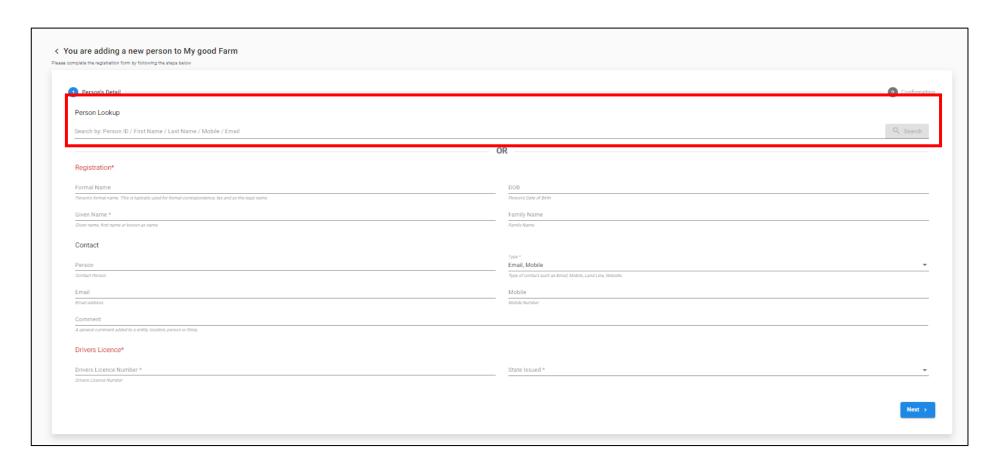




Adding a Person - Step 5: Searching for a Current Horse Records User

Using the 'Person Lookup' function, we can search for a person using:

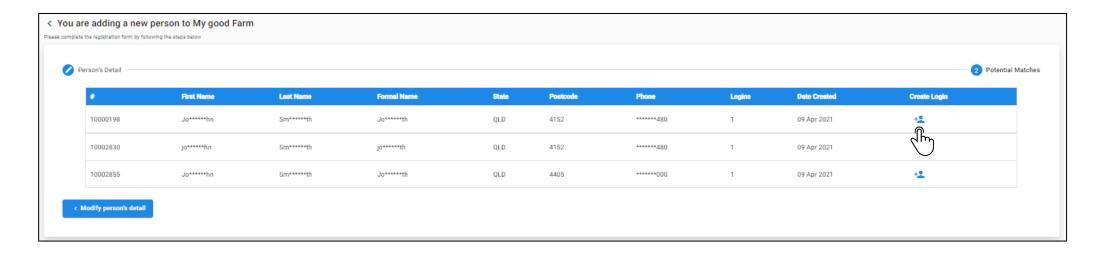
- a. Person ID
- b. First and Last name
- c. Mobile
- d.Email.



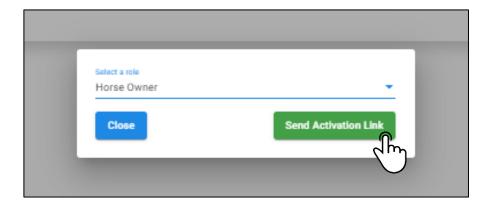


Adding a Person - Step 6: Displaying Search Results of Current Users

The search will display partially hidden results based on your search. If the hidden details match the persons details, you can click the button to add the person to your location.



A pop-up menu will display prompting you to select what role you would like to allocate to this person. Once finalised, click the 'send activation link' button.





Adding a Person - Step 7: Resending the Activation Email/Text (Current User)

On your dashboard, if the user has not yet accepted the login request, you can resend the request via email or SMS by first clicking the three dots and then resending the request.

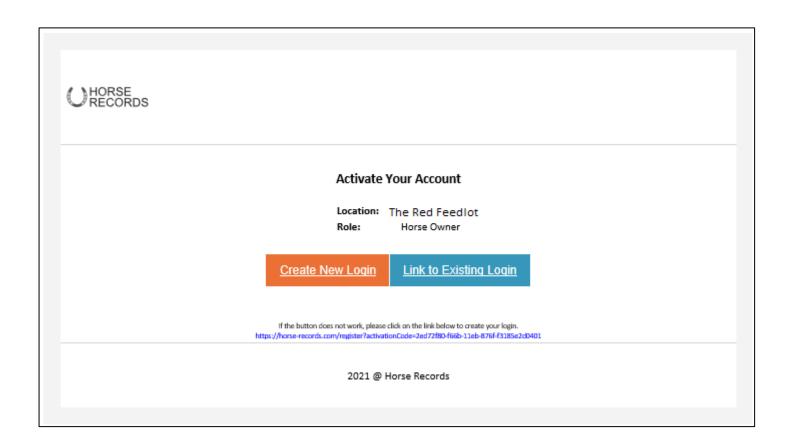
Authorisation Notifications							
Sender	Recipient	Туре	Status	Date	Action		
John Smith	100015456	login	Activation link sent at 25 Aug 2021 11:21	24 Aug 2021	<u> </u>		



Adding a Person - Step 8: Activation Email (Current User)

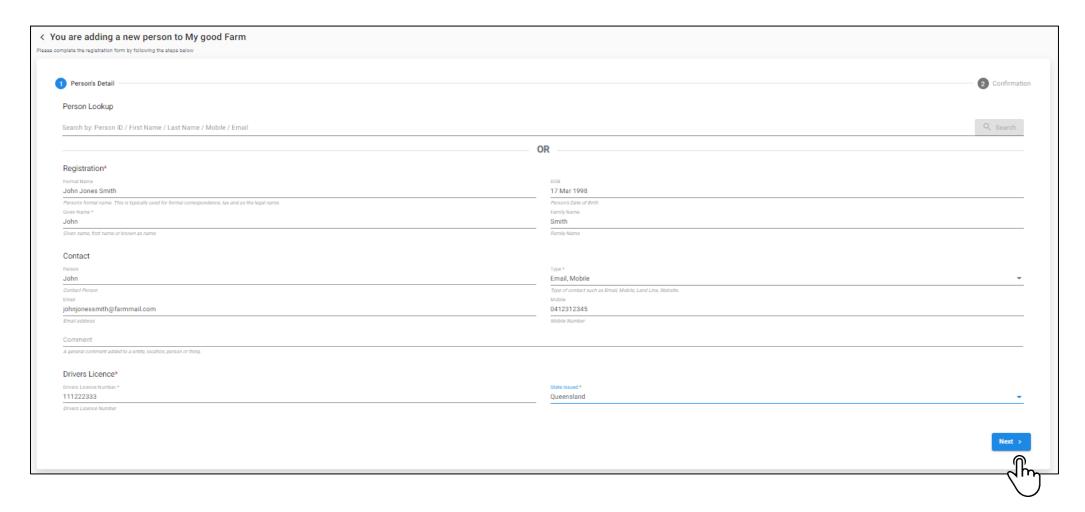
The user will receive an email to add their details to your location.

The user can either link the role to their current login or create a new login for the location.



Adding a Person - Step 9: Adding a New Horse Records User

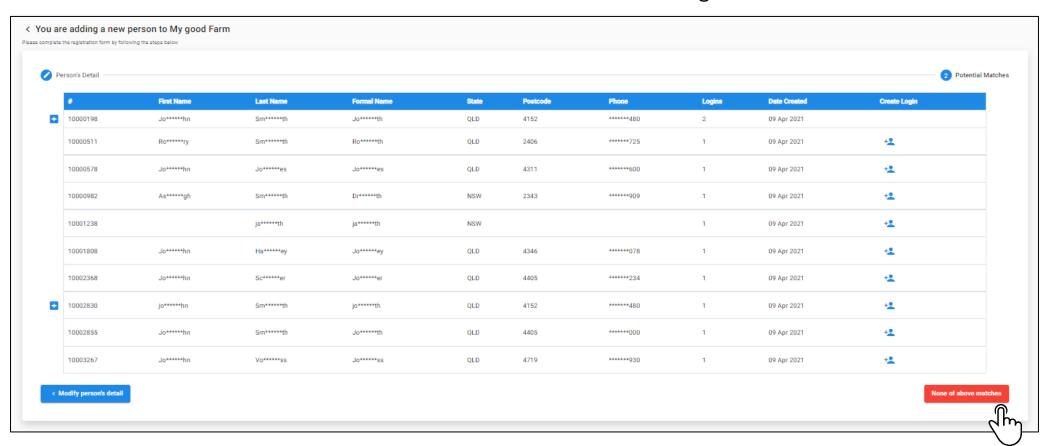
If you search for the user and they cannot be found, fill out the details associated to the person and then click next.





Adding a Person - Step 10: Displaying Search Results of Current Users

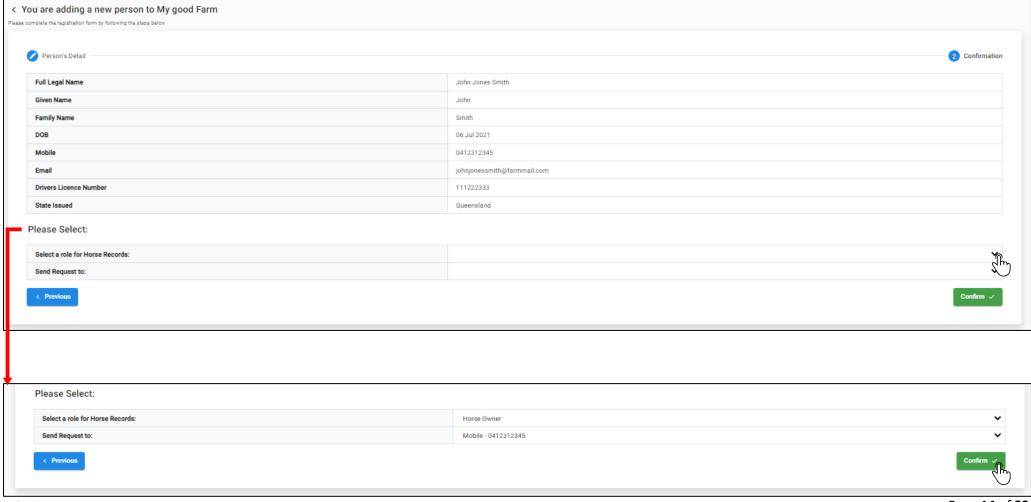
After you click next, it will display a result of potential current horse records users that may match the details that you have entered. If none of these results match your person, click the red 'none of above matches' button in the bottom right-hand corner to continue.





Adding a Person - Step 11: Sending an activation to the users contact.

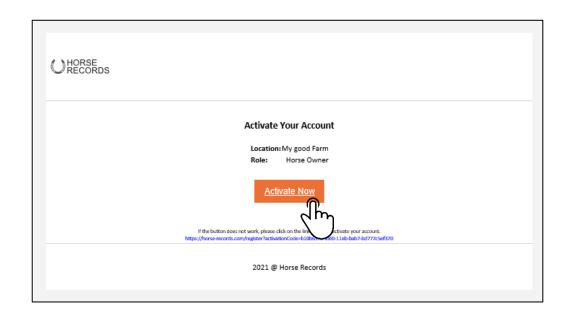
A screen will display to finalise the results of the person. At the bottom of the page, it will prompt you to select the role you want to add to this person and what contact (i.e. mobile or email) you want to send the activation request to.





Adding a Person - Step 12: Activation Email (New User)

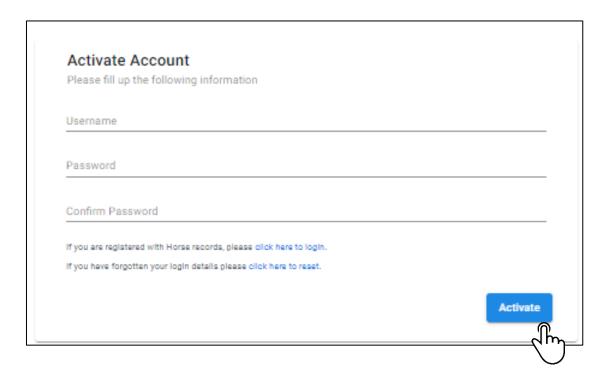
The person will receive an activation link via their email or mobile depending on which option you select.





Adding a Person - Step 13: Activation the new user's account

The person will be directed to a page where they can create their username and password. Once entered, the person will be added to your location and the person will be able to use Horse Records freely.



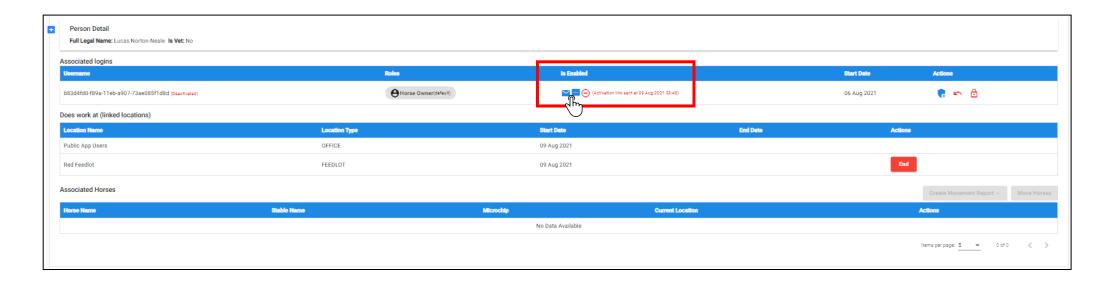
Adding a Person - Step 14: Confirming the persons account activation

Once the user has created their username and password, their username will display and it will show that their account is now enabled.



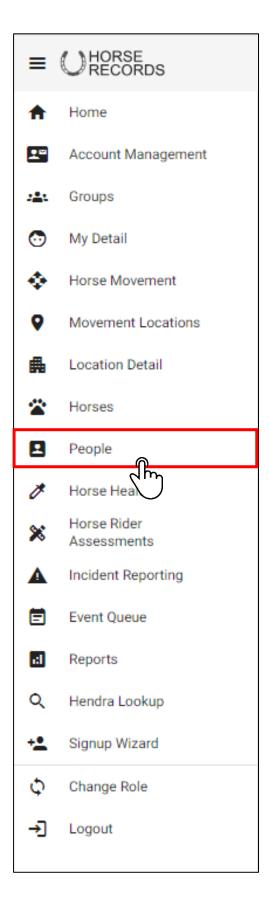
Adding a Person - Step 15: Resending the Activation Email/Text

If the user has not created their account, you can resend the request to their email or phone number by clicking the email or text message buttons. If you want to revoke the request, you can click the minus button.



Editing a Person - Step 1: Click the people tab

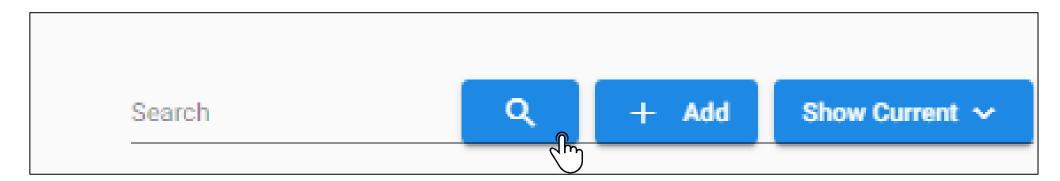
On the left-hand side, click the 'People' tab on the side bar panel.





Editing a Person - Step 2: Searching for the person

Use the search function in the top right-hand corner to find the person you want to edit.

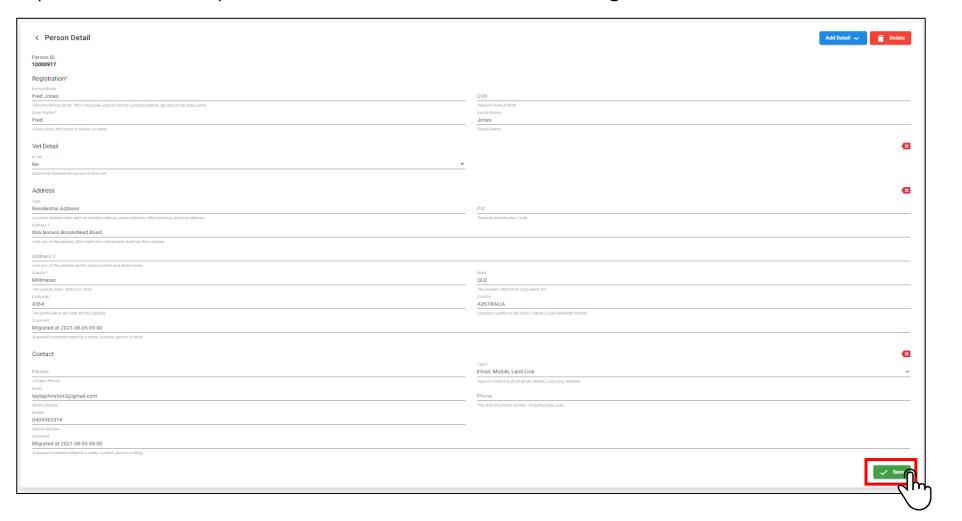




Editing a Person - Step 3: Editing their details

Once you have found the person, click the blue pencil button to edit their details.

Once opened, edit the persons details and then click the green save button

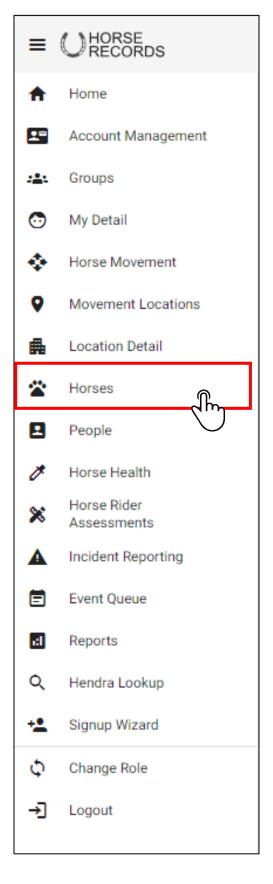




Adding a Horse - Step 1: Horse Tab

Once the person has been added to the location, you can now add their horses to the person. To start this process, On the left-hand side, click the 'Horses' tab on the side bar

panel.





Adding a Horse - Step 2: Adding the horse

In the top right-hand corner of the page, click the 'add' button.



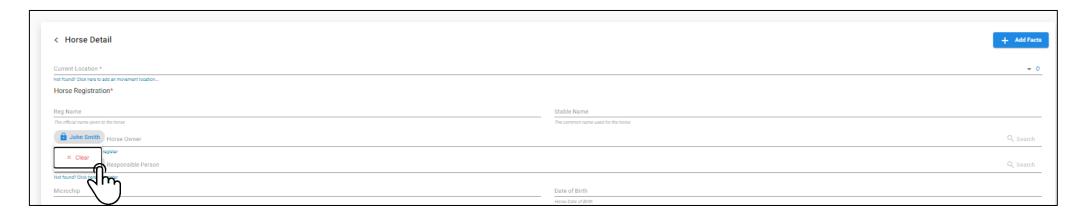


Adding a Horse - Step 3: Removing Feedlot Livestock Admins Details from the

Your details will pre-enter into the horse owner and person responsible fields.



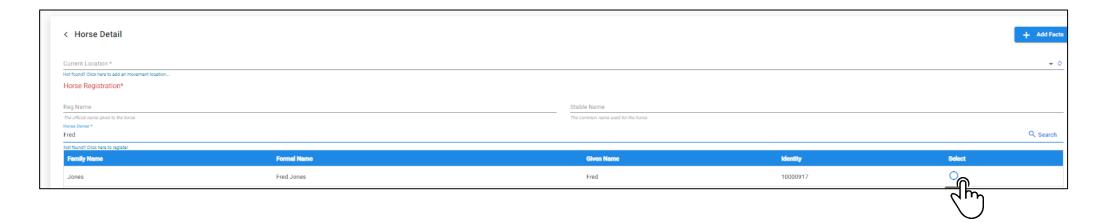
To remove your details from the form (so you can enter the users name), click on your name and then click clear.





Adding a Horse - Step 4: Searching for the person

Type the person's name in horse owner and responsible person section, type in the person's name and press 'enter' to search. Their name will display and click the select button to enter them into the form.



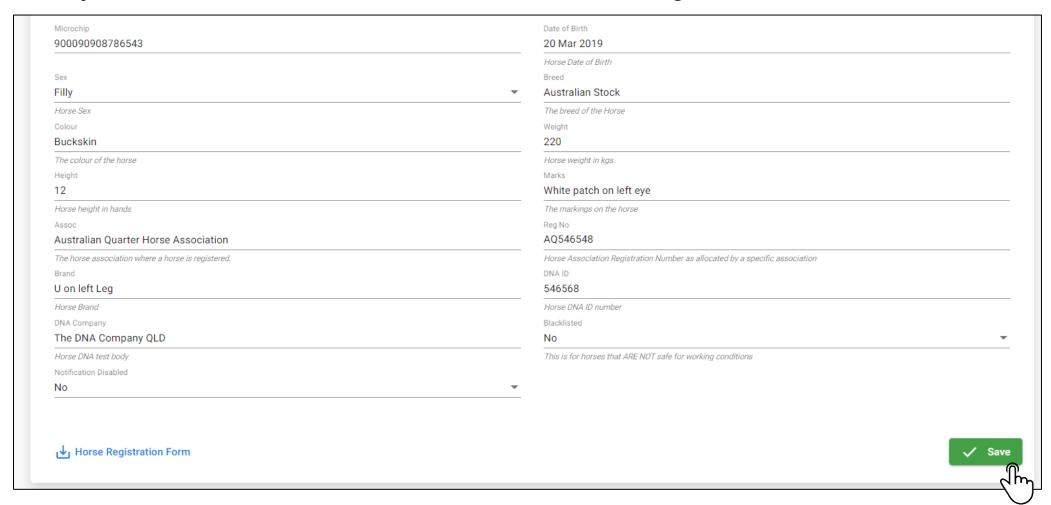
Their name will then lock into the text field. (As Below)





Adding a Horse - Step 5: Saving the horses details

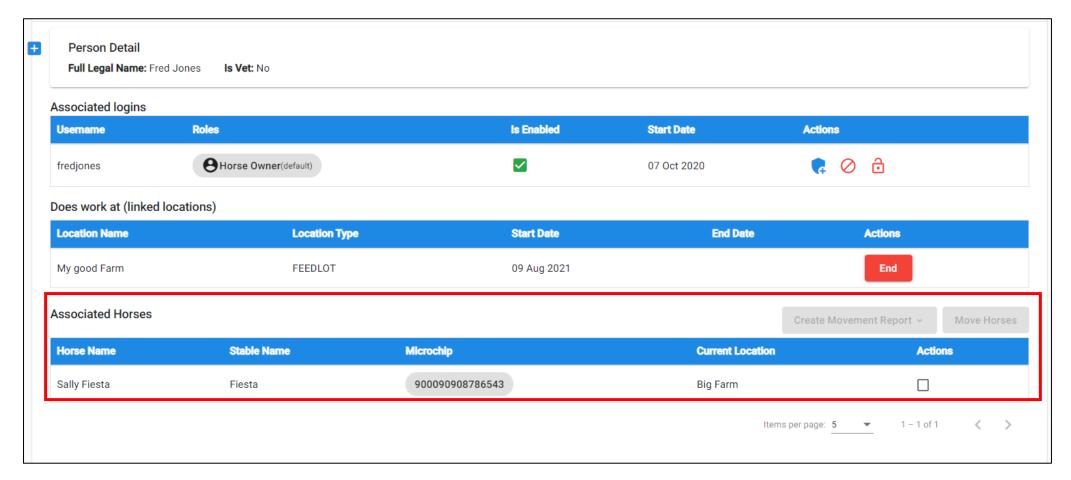
Once you have finalised the details of the horse, click the green save button.





Adding a Horse - Step 6: Confirming the horse has been added.

Under the persons details, you will then see the horse under the persons associated horses.





Editing a Horse - Step 1: Horse Tab

If you want to edit the details of this horse because you may have entered them incorrectly, on the left-hand side, click the 'Horses' tab on the side bar panel





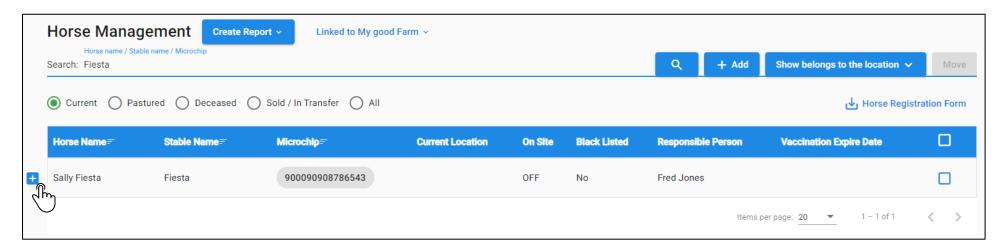
Editing a Horse - Step 2: Searching for the horse

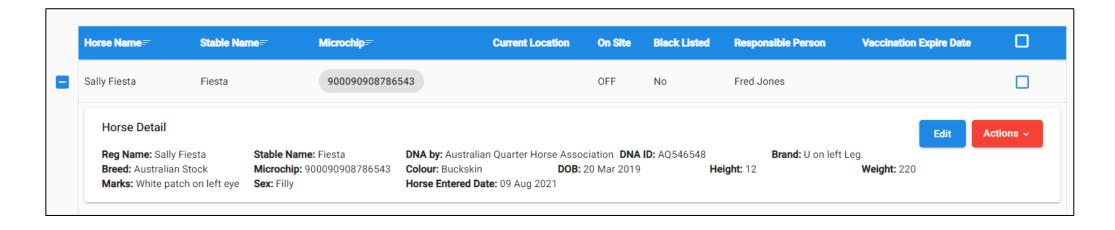
Using the Search Function, Search for the horse (by either horse name, stable name or microchip) that you want to edit.



Editing a Horse - Step 3: Expanding the horses' details

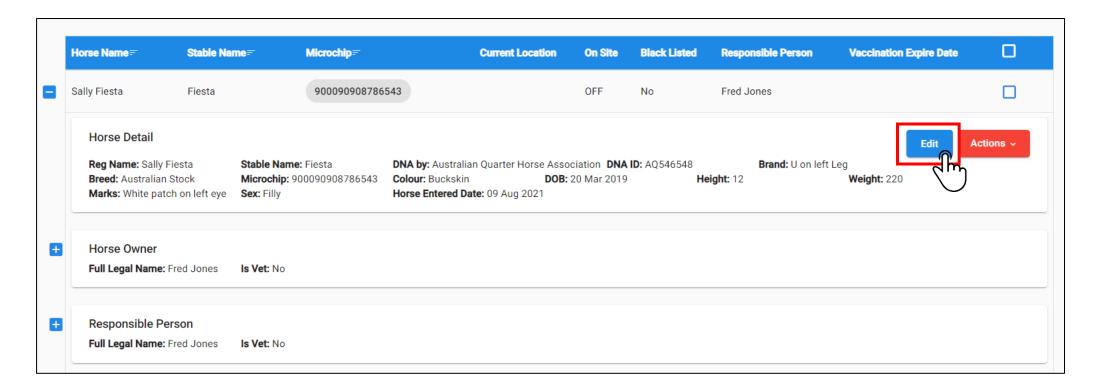
Expand the horses' details using the + button next to their name.





Editing a Horse - Step 4: Expanding the persons details

Once you have expanded the details, click the blue 'edit' button on the horse.



Editing a Horse - Step 5: Editing and saving the details of the horse.

Edit the horses' details then click the green save button.

