



How-To and Demonstration Scenario

Contents

Demonstration Scenario.....	2
Sheep.....	2
Events.....	3
Reports.....	3
Steps.....	4
Adding Demonstration Sheep.....	4
Adding Events and/or Additional Information.....	6
Adding Breed(s).....	6
Adding Offspring.....	7
Adding Medicinal Records.....	8
Adding Weight Records.....	9
Adding Castration Dates.....	9
Documenting Sales.....	10
Adding Mark Dates.....	10
Running Reports.....	11
Sharing Reports.....	13
Sharing Ancestor Reports.....	14



Demonstration Sheep

1) **Tilly 9261**

Birthdate: January 26, 2009
Sex: Female
Sire: Majesty (not in your flock)
Dam-Sire: 45 (not in your flock)

2) **Trudy**

Birthdate: January 31, 2014
Sex: Female
Dam: Tilly 9261 (in your flock)
Sire: Lou (not in your flock)
Born a triplet

3) **Ziggy**

Birthdate: January 24, 2015
Acquired: February 28, 2015 for \$100
Sex: Male
Sire: Ratchet (not in your flock)
Dam-Sire: Screwball (not in your flock)
DNA: RRNN

4) **C413**

Birthdate: February 14, 2015
Acquired: July 16, 2015 for \$100
Sex: Female
Sire: Blast Off (not in your flock)
Dam-sire: Lou (not in your flock)

5) **Butters (4426)**

Birthdate: Feb 23, 2014
Sex: Female
Sire: Diego (not in your flock)
Dam: Margi (not in your flock), and Margi's sire was Unique (not in your flock)

Events

- 1) On January 24, 2016, C413 had a single ewe. On January 26, 2016, you administered CD-T/Bo-Se to the ewe and docked her tail.
- 2) On January 26, 2016, Trudy had triplets: 6411, 6412 and 6413. All boys.
- 3) On January 27, 2016, Butters had a single boy. It weighed 10 pounds at birth.
- 4) On February 26, 2016, you banded all of Trudy's boys.
- 5) On April 17, 2016, you sold 6413 to Jack Smith for \$600.
- 6) On May 23, 2016, Trudy marked to Ziggy. On May 24, 2016, Trudy marked to Ziggy.

Reports

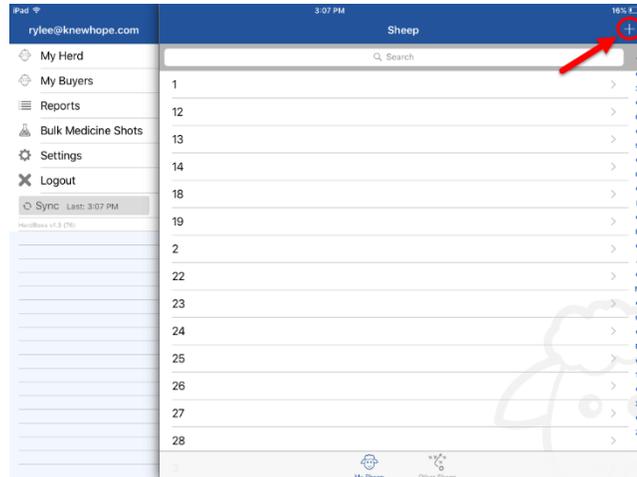
After you have entered all the data, run the following reports:

- 1) Herd Report for all sheep in your flock.
- 2) Sold Report for sheep sold in 2016.
- 3) Ancestor chart for 6413 and email it to: theteam@herdboss.com
- 4) Mark Report for mark dates from January 1, 2016 until today.
- 5) Offspring Report for Trudy.

Steps

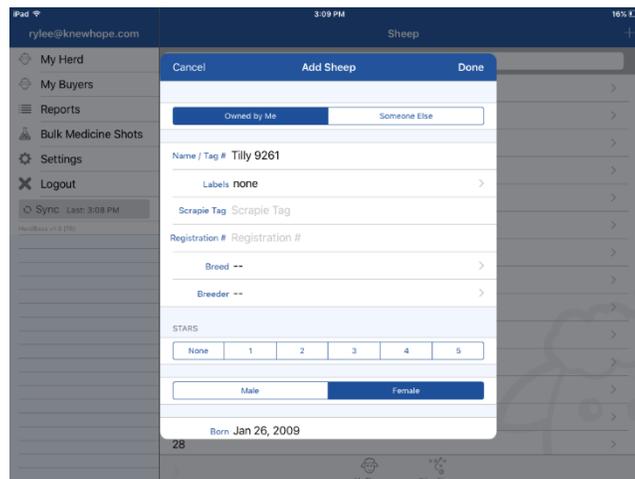
Adding Demonstration Sheep

- 1) Open and log into HerdBoss on your device.
- 2) Find the + sign in the upper right hand corner and tap it.



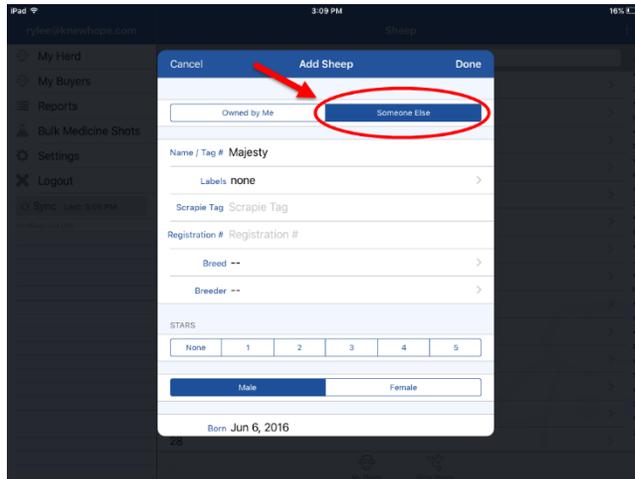
All images were captured on an iPad. Screens may vary slightly on different devices.

- 3) A pop-out window titled “Add Sheep” will appear.



- 4) Enter relevant information for **Tilly 9261** into the appropriate fields.
 - a. Make sure you scroll down to access additional fields.
 - b. When entering **Tilly 9261's** sire Majesty, you will tap the “Sire” field and a new pop-out window will appear. In that window, you will select the + sign in the upper right hand corner. Another pop-out window appears into which you can enter what you know about Majesty (his name and that he is owned by someone else).
 - i. To indicate that Majesty is owned by someone else, look towards the top of the screen and you will see two fields. One is “Owned by Me;” the other is “Someone Else.” Currently, “Owned by Me” is highlighted in blue. You

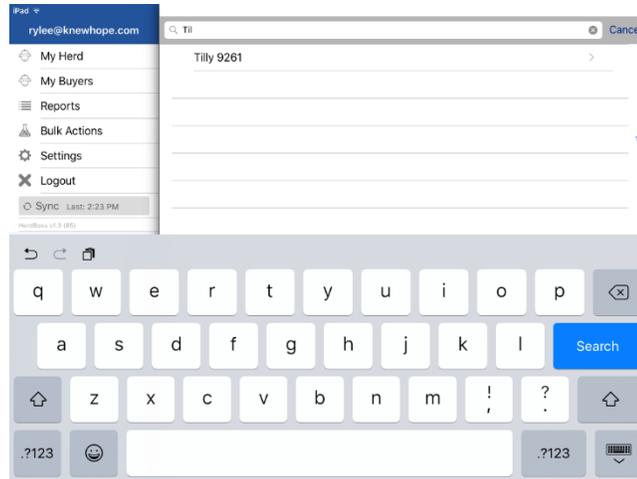
will need to tap “Someone Else” to change that part of the record. Once you have added the information, tap “Done” in the upper right hand corner.



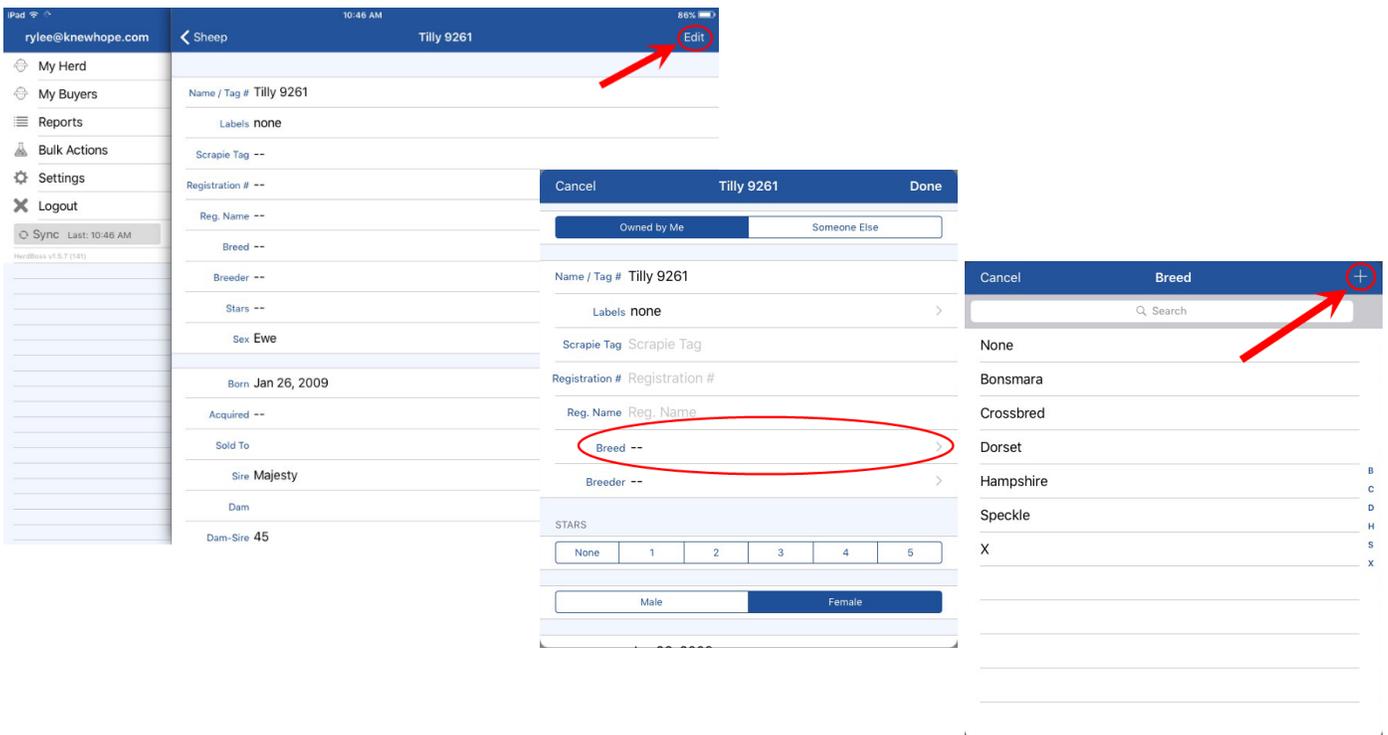
- 5) After selecting “Done,” HerdBoss returns you to **Tilly 9261’s** pop-out window. *You will need to repeat the step 4b when entering the dam-sire information for **Tilly 9261**.*
- 6) Once you have entered all of **Tilly 9261’s** information, tap “Done” in the upper right hand corner.
 - a. If you have already entered the sire, dam, or dam-sire for a new sheep that you are adding, you can simply search for that ancestor’s record and select it.
- 7) Repeat steps 2 through 4 for **Trudy, Ziggy, C413, and Butters (4426)**.
 - a. Make sure to check and see if you own each sheep’s sire and dam-sire.
 - b. If you make a mistake and need to edit one of your sheep, look the sheep up by selecting the “Search” field at the top of the screen and typing the sheep’s name or tag number into the field. Once the animal appears, tap their record. This will take you into a new screen that shows all of the animal’s information. In order to make any changes, tap “Edit” in the upper right hand corner, and the pop-out window used to enter the sheep will reappear. You are then able to edit the record.

Adding Events and/or Additional Information

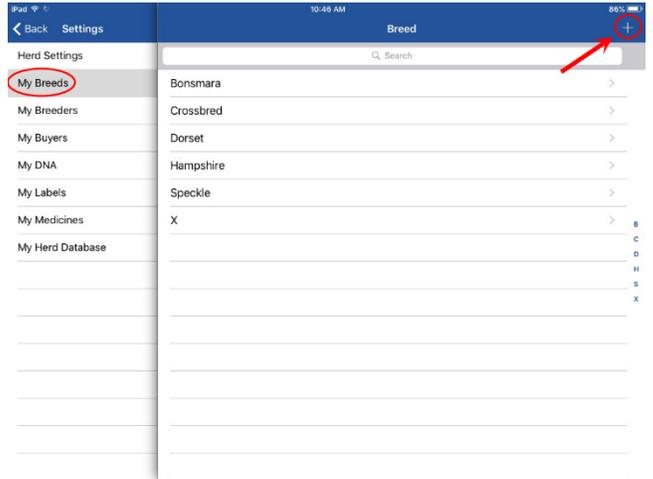
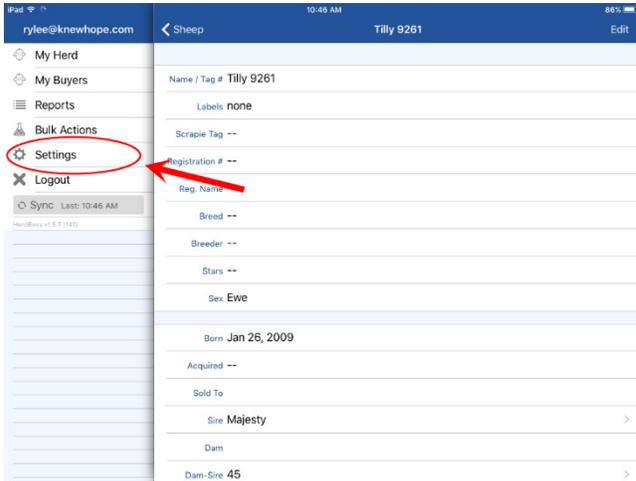
- 1) To add most events, select “Search” at the top of the screen, enter the name or tag number of the sheep, and select that sheep.



- a. Adding Breed(s) (there are two ways to do this):
 - i. To add the breed to the sheep’s record, select “Edit” in the upper right hand corner. When the “Edit” screen appears, look for “Breed” and tap it. Another screen will appear, titled “Breed.” You can select an available breed or add another breed by tapping + in the upper right hand corner.

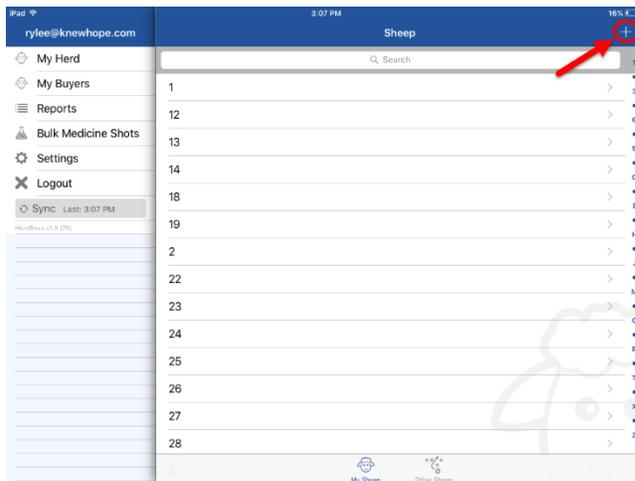


- ii. OR to add additional breeds to the list of breeds, select “Settings” on the left side of your screen, then select “My Breeds” and tap + in the upper right hand corner to add additional breeds.

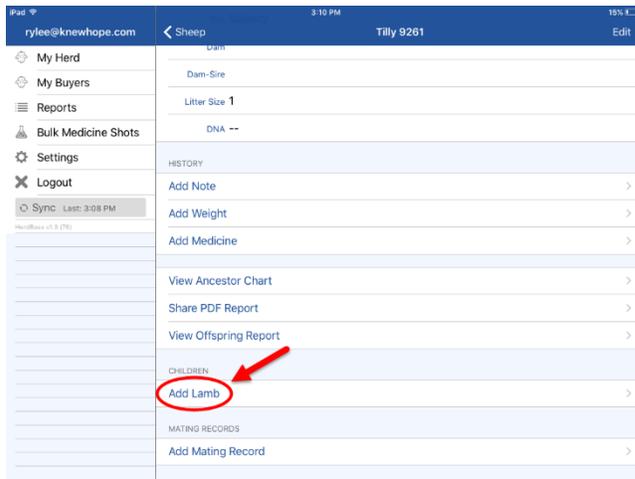


b. Adding Offspring (there are two ways to do this):

- i. Hit the + sign and add a new sheep just like you did when entering the demonstration sheep.

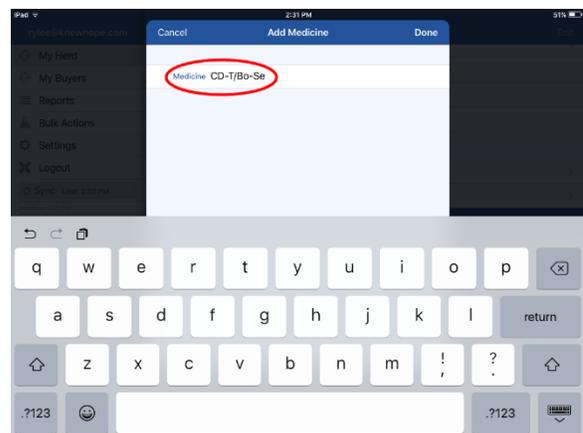
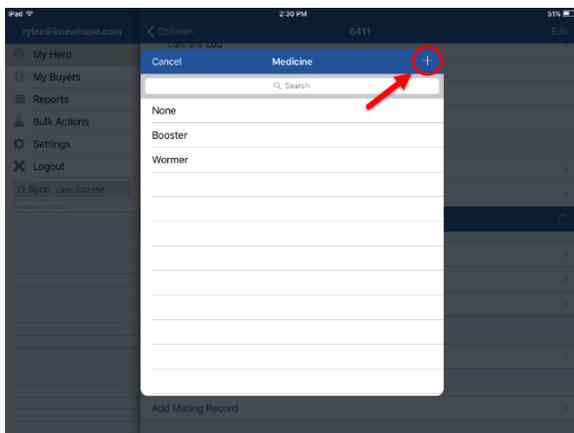


- ii. OR “Search” the dam’s name or tag number, select her record, scroll down and look for “Add Lamb” under the section titled Children, tap “Add Lamb,” and fill out the fields in the pop-out window with what information you have available.



c. Adding Medicinal Records:

- i. “Search” and select the sheep you would like to add records to, scroll down looking for the section titled History, and tap “Add Medicine.” When the medicine pop-out window appears, you will select the fields that need completed. You are able to customize your medicines to fit whatever you may administer to your sheep.
- ii. Search for the + sign to add new medicines.



d. Adding Weight Records:

- i. "Search" and select the sheep you would like to add records to, scroll down looking for the section titled History, and tap "Add Weight." When the weight pop-out window appears, you will add the weight and change the date.

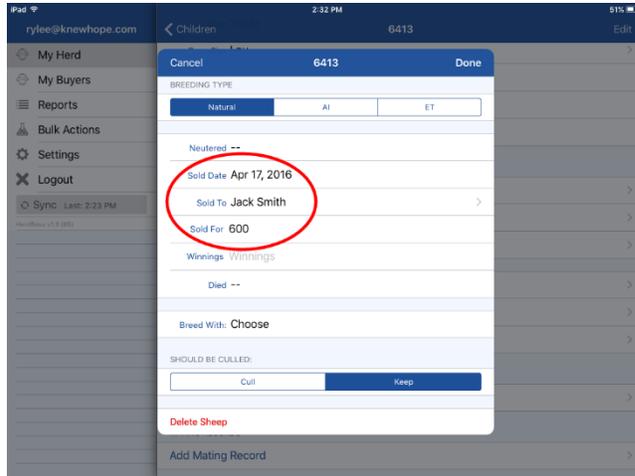
e. Adding Castration Dates:

- i. "Search" and select the sheep you would like to add a castration date to. Select "Edit" in the upper right hand corner of that sheep's record and scroll down looking for "Neutered." Tap "Neutered" and adjust the date selector to reflect the date you neutered the ram -- make sure to tap "Done" to save your changes.

The screenshot shows a mobile application interface for editing a sheep's record. At the top, there is a blue header bar with 'Cancel' on the left, '6411' in the center, and 'Done' on the right. Below the header, the form contains several sections: 'Litter Size 3' with minus and plus buttons; 'DNA --' with a right arrow; a 'BREEDING TYPE' section with three buttons: 'Natural' (selected), 'AI', and 'ET'; 'Neutered --' (circled in red); 'Sold Date --'; 'Sold To --' with a right arrow; 'Sold For Amount'; 'Winnings Winnings'; 'Died --'; and 'Breed With: Choose'. At the bottom, there is a section labeled 'SHOULD BE CULLED:'.

f. Documenting Sales:

- i. “Search” and select the sheep you would like to add a castration date to. Select “Edit” in the upper right hand corner of that sheep’s record and scroll down looking for “Sold Date,” “Sold To,” and “Sold For.” Fill in these fields with the information you have available. Once you have added sales information, HerdBoss automatically moves the sold sheep into “Other Sheep.”



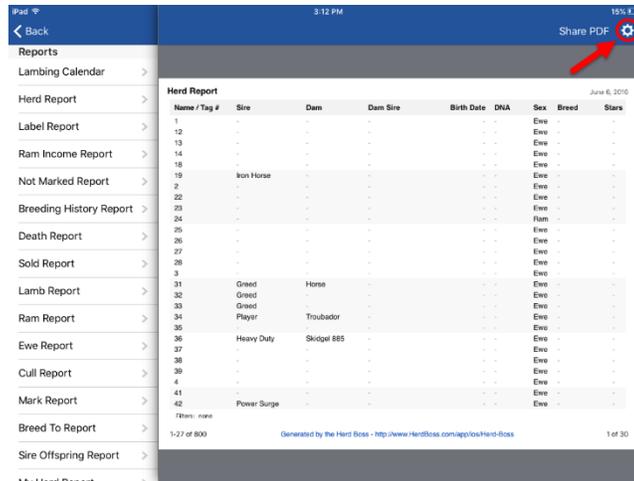
1. To view “Other Sheep,” return to the homepage by selecting “My Herd” on the left hand side of the screen. Then, look toward the bottom of your screen and you will find “My Sheep” and “Other Sheep.” You can switch between the two flocks by tapping the one you would like to see.

g. Adding Mark Dates:

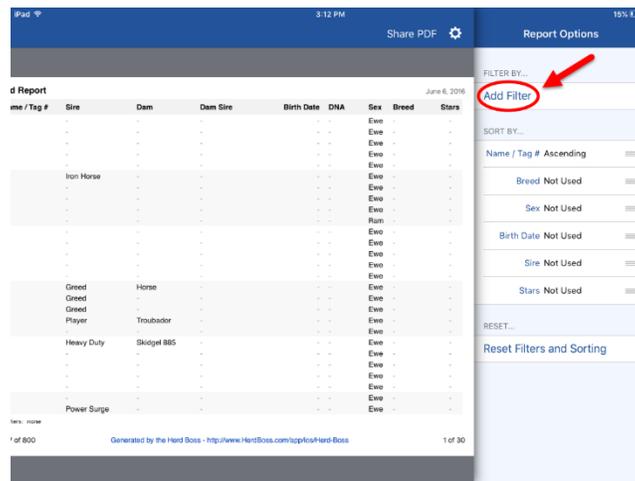
- i. “Search” and select the sheep you would like to add records to, scroll down looking for the section titled History, and tap “Add Mating Record.” When the pop-out window appears, you will fill in the fields as needed. HerdBoss will predict the ewe’s due date based on the mark date you enter!

Running Reports

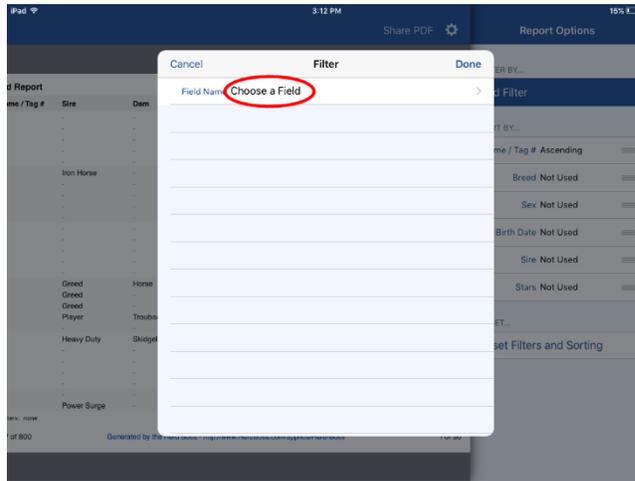
- 1) With your device on landscape (turned horizontally or long ways), tap “Reports” on the left side of the screen.
- 2) Select the report you would like to run from the list that appears on the left side of the screen.
- 3) Once you have selected your report, customize the report by clicking the gear symbol in the upper right hand corner of the screen.



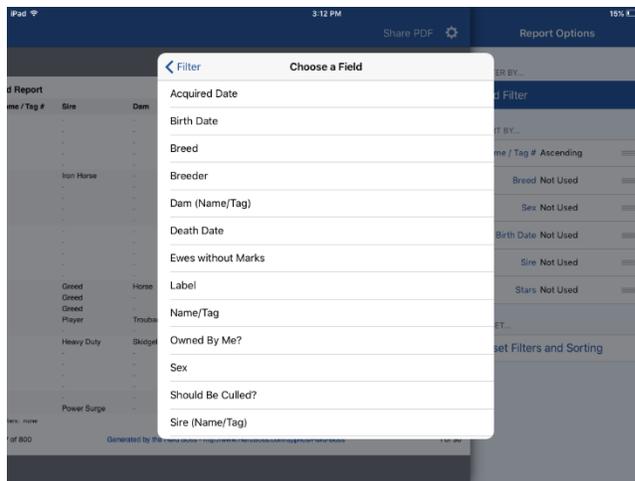
- 4) “Add Filter” allows you to narrow your search and returns a more specific report.



- i. When you tap “Add Filter,” a new pop out window will appear, and you will tap “Field Name Choose a Field” to begin specifying your report search engine.



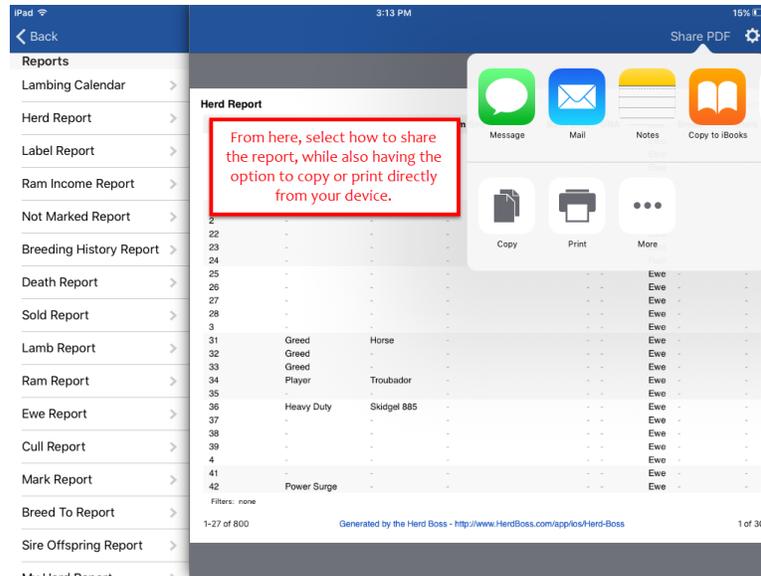
- ii. Once you select the field you would like use to generate your report, fill out the fields as desired.



1. If you no longer need the filter(s) you have created, you can tap the gear symbol, and at the bottom of the column that appears, you will tap “Reset Filters and Sorting.”
2. To close the filtering column, tap the gear symbol and the list of reports will appear on the left side of your screen. If you want to return to your flock, tap the “Back” button above the list of available reports.

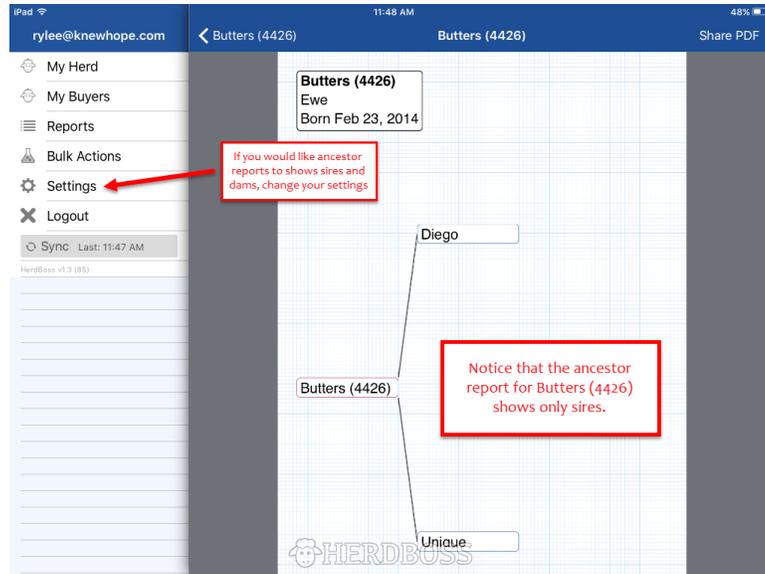
Sharing Reports

- 1) If you have generated a report and would like to share it, select “Share PDF” in the upper right hand corner of the report screen.

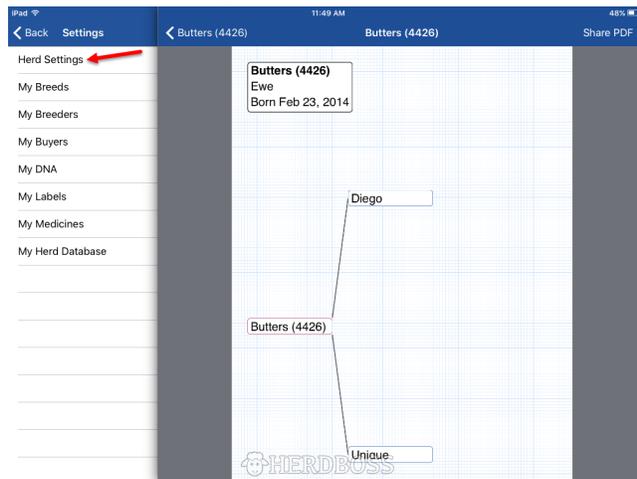


Sharing Ancestor Reports

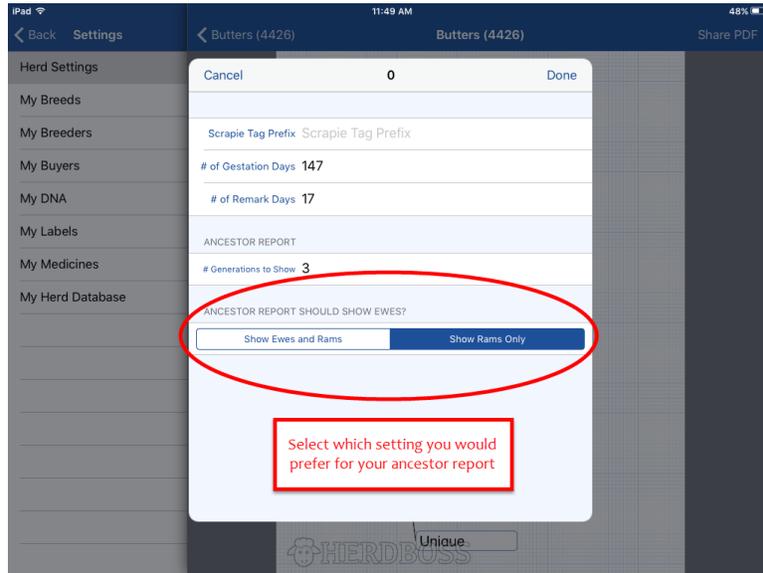
- 1) “Search” and select the sheep whose ancestry you would like to view, scroll down looking for the section titled History, and tap “Share PDF Report.” When the report appears, find and tap “Share PDF” in the upper right hand corner.
 - a. The default settings for ancestor reports show both ewes and ram. This can be changed to show only rams.
 - i. Click “Settings.”



- ii. Then, select “Herd Settings.”



- iii. At the bottom of the pop-out screen that appears are two options for what to display in ancestor reports.



If you have additional questions about using HerdBoss, please email us at theteam@herdboss.com