



## How-To User Manual

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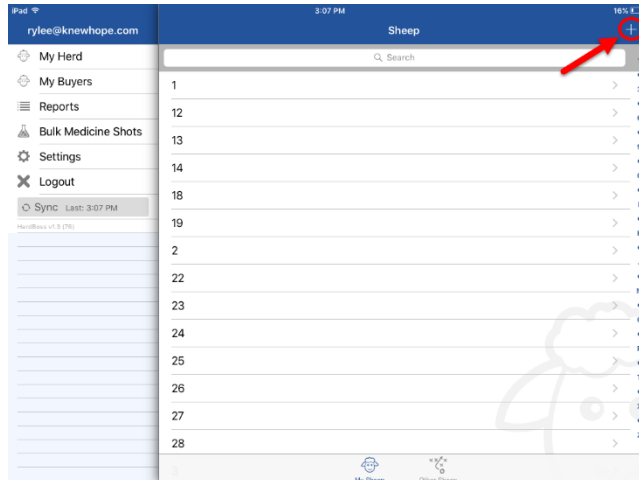
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# Steps

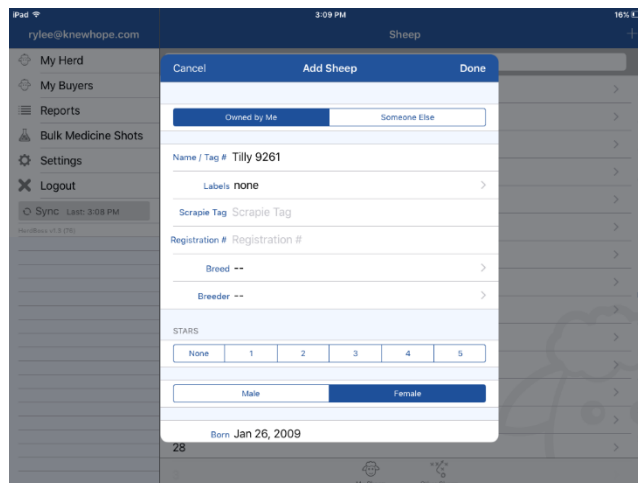
## Adding Sheep

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



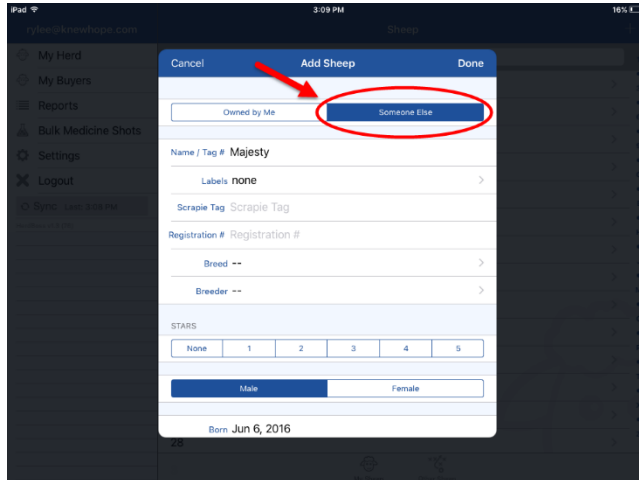
*All images were captured on an iPad. Screens may vary slightly on different devices.*

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



- 4) Enter relevant information for the sheep into the appropriate fields
  - a. Make sure you scroll down to access additional fields
  - b. For example: When entering the sire, you will tap the “Sire” field and a new pop-out window will appear allowing you to select the sire. If the sire has not been added to HerdBoss, 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 the sire

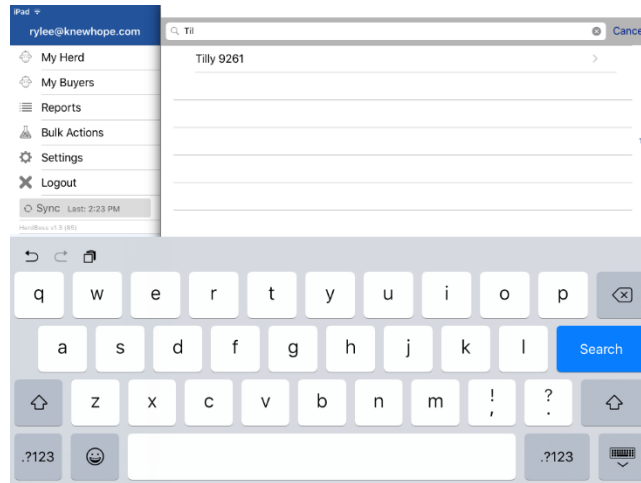
- i. If the sire is owned by someone else, look towards the top of the screen, and you will see two fields. One is “Owned by Me;” the other is “Someone Else.” You will need to change to “Someone Else” to indicate that the sire is not yours



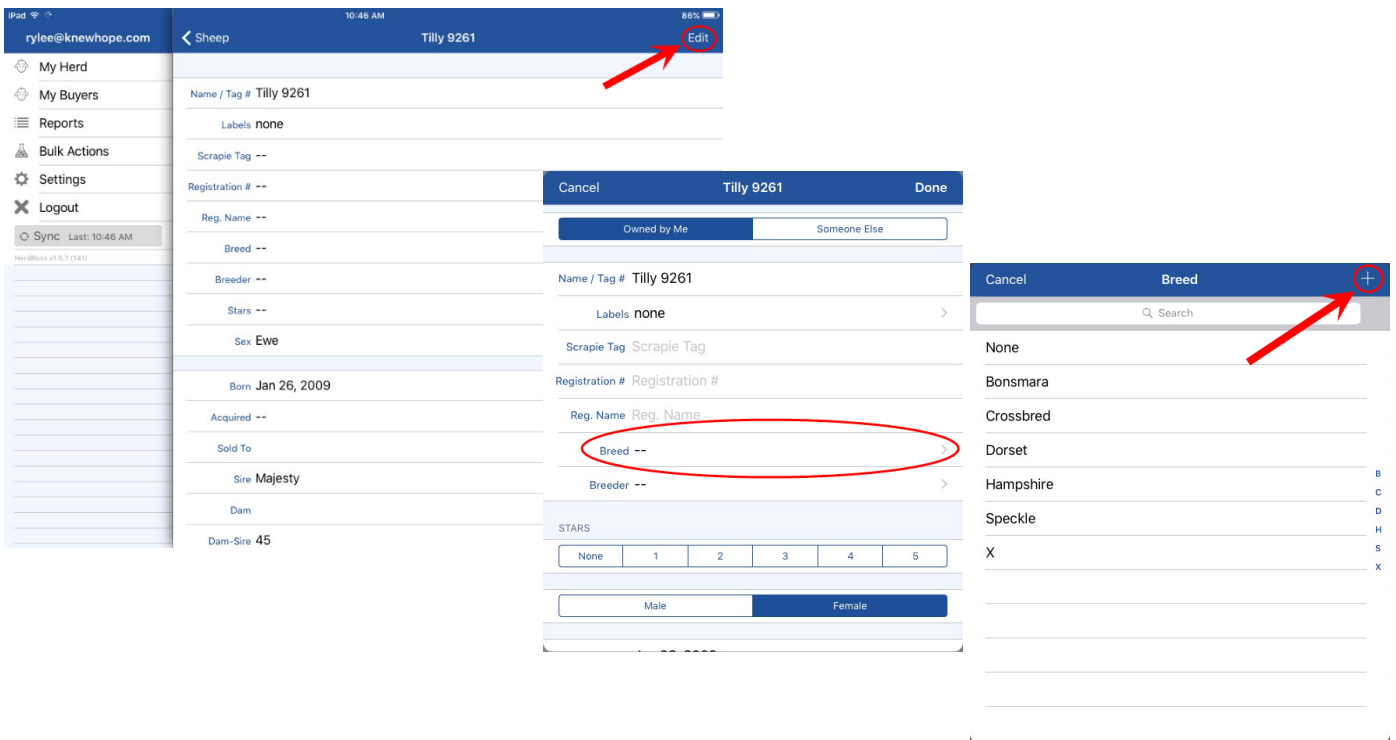
- 5) After selecting “Done,” HerdBoss returns you to the sheep’s pop-out window
- 6) Once you have entered all of the information, tap “Done” in the upper right hand corner

## Adding Events and/or Additional Information

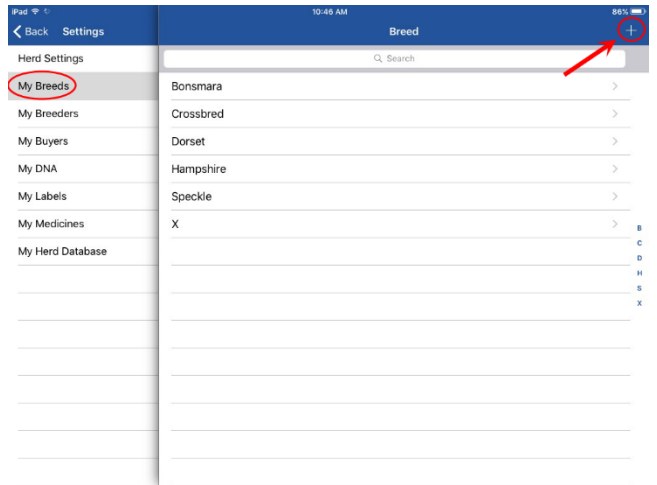
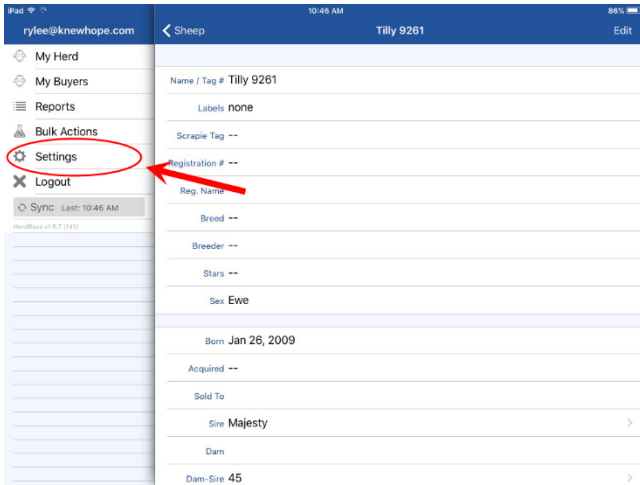
- 1) To add most events, select “Search” at the top of the screen, enter the name or tag number of the sheep, and select that sheep



- 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

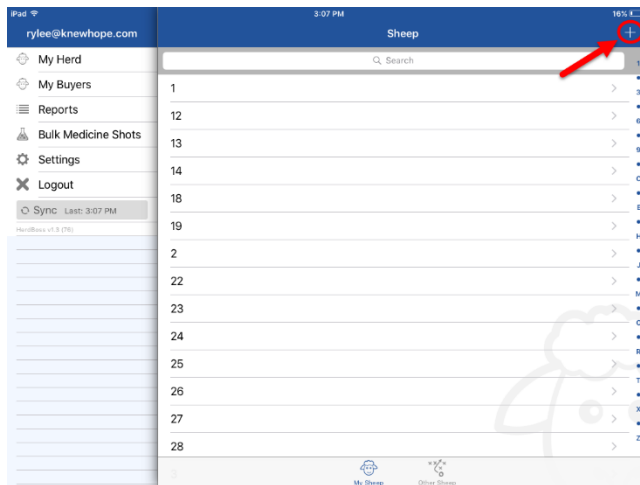


- ii. OR to add additional breeds to the list of breeds, select “Settings” on the left side of your screen, then select “My Breeds” and tap “+” in the upper right hand corner to add additional breeds

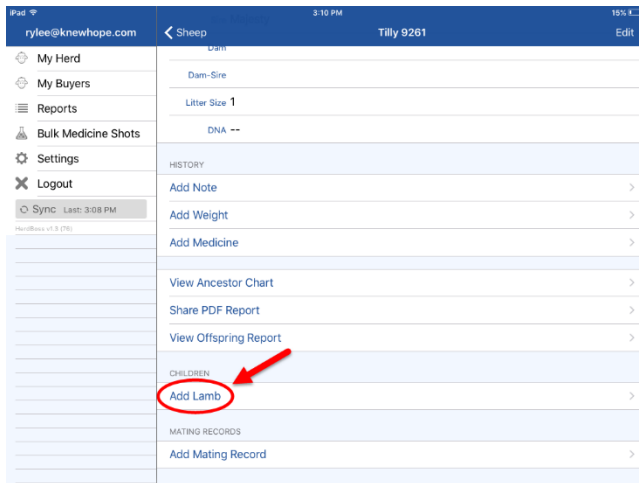


b. Adding Offspring (there are two ways to do this):

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

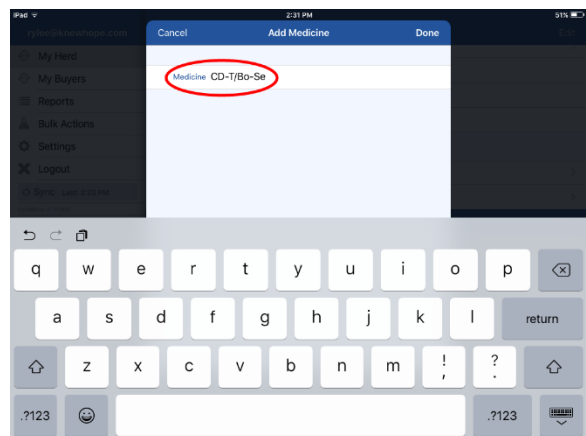
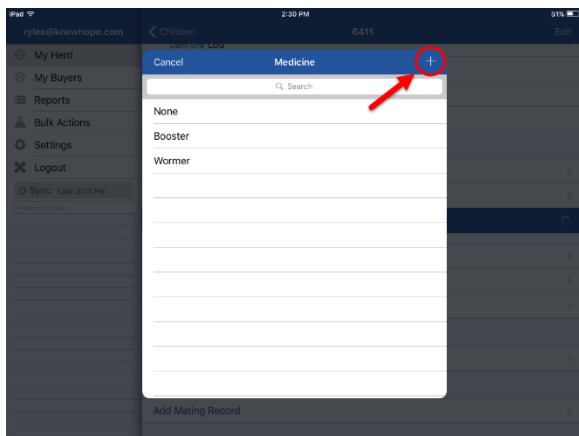


- ii. OR “Search” the dam’s name or tag number, select her record, scroll down and look for “Add Lamb” under the section titled Children, tap “Add Lamb,” and fill out the fields in the pop-out window with what information you have available



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. Select 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:

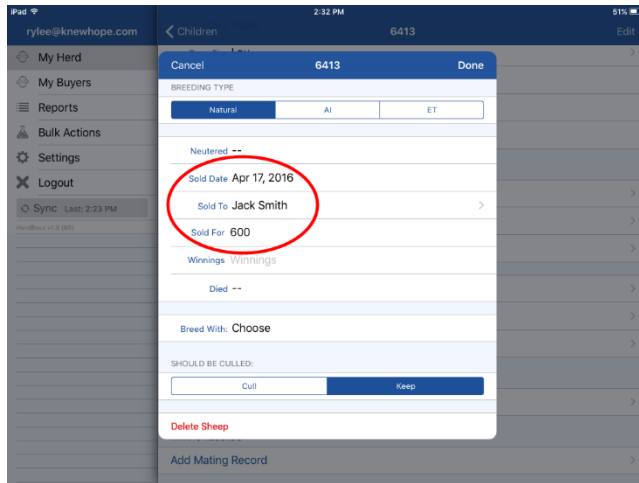
- i. "Search" and select the sheep you would like to add a castration date to. Select "Edit" in the upper right hand corner of that sheep's record and scroll down looking for "Neutered." Tap "Neutered" and adjust the date selector to reflect the date you neutered the ram -- make sure to tap "Done" to 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 fields: '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 --' which is circled in red; 'Sold Date --'; 'Sold To --' with a right arrow; 'Sold For Amount'; 'Winnings Winnings'; and 'Died --'. At the bottom, there is a 'Breed With: Choose' field and a partially visible 'SHOULD BE CULLED:' field.



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”



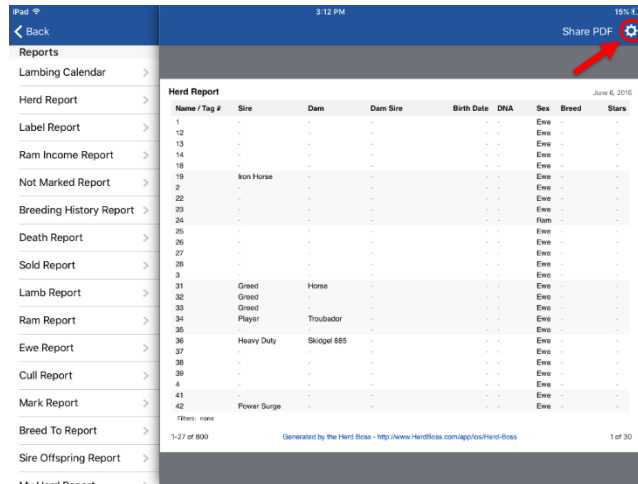
1. To view “Other Sheep,” return to the homepage by selecting “My Herd” on the left hand side of the screen. Then, look toward the bottom of your screen and you will find “My Sheep” and “Other Sheep.” You can switch between the two flocks by tapping the one you would like to see

g. Adding Mark Dates:

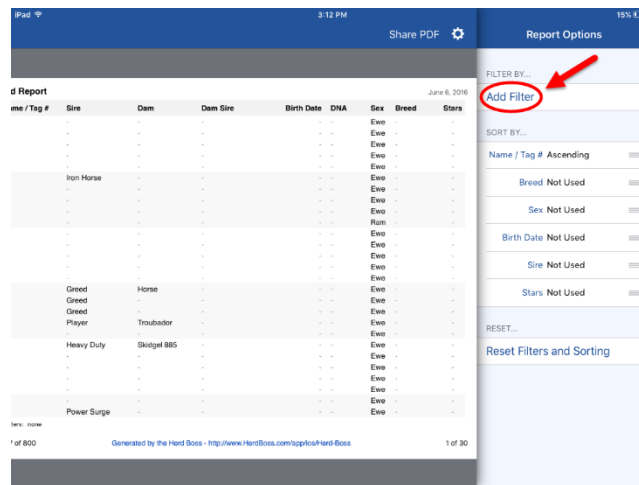
- i. “Search” and select the sheep you would like to add records to, scroll down looking for the section titled History, and tap “Add Mating Record.” When the pop-out window appears, you will fill in the fields as needed
  1. HerdBoss will predict the ewe’s due date based on the mark date you enter!

## Running Reports

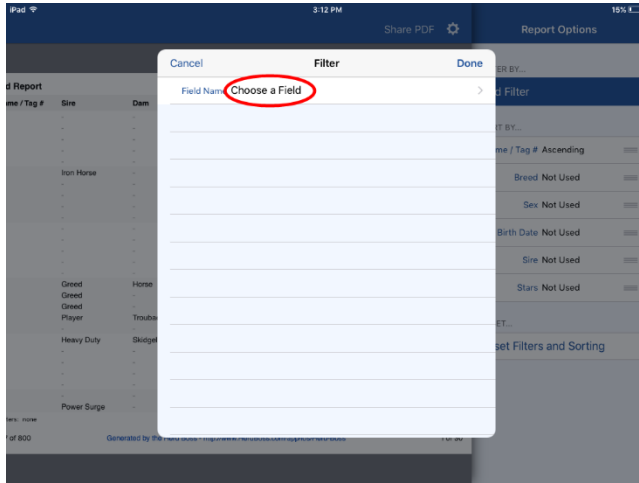
- 1) With your device on landscape (turned horizontally or long ways), tap “Reports” on the left side of the screen
- 2) Select the report you would like to run from the list that appears on the left side of the screen
  - a. Customize the report by clicking the gear symbol in the upper right hand corner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



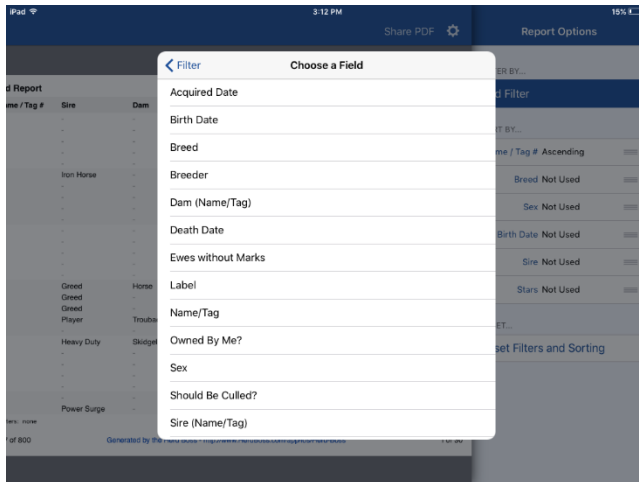
- b. “Add Filter” allows you to narrow your search and returns a more specific report



- 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



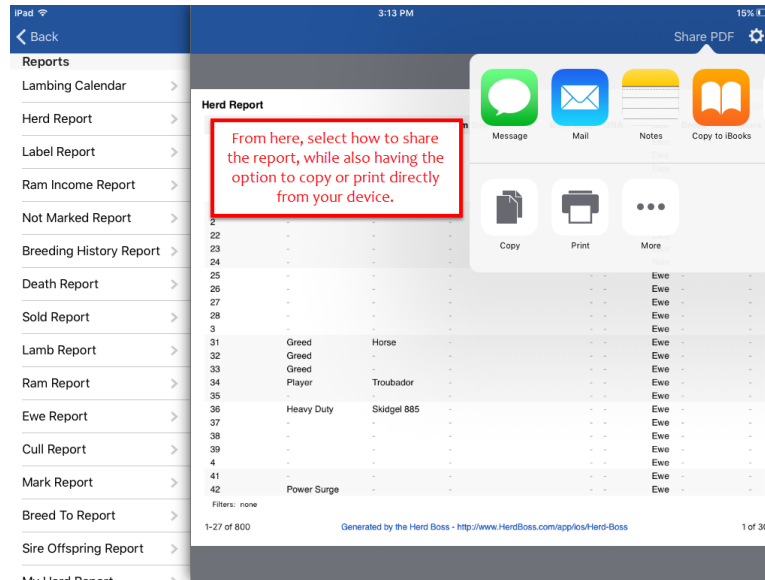
- ii. Once you select the field you would like use to generate your report, fill out the fields as desired



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

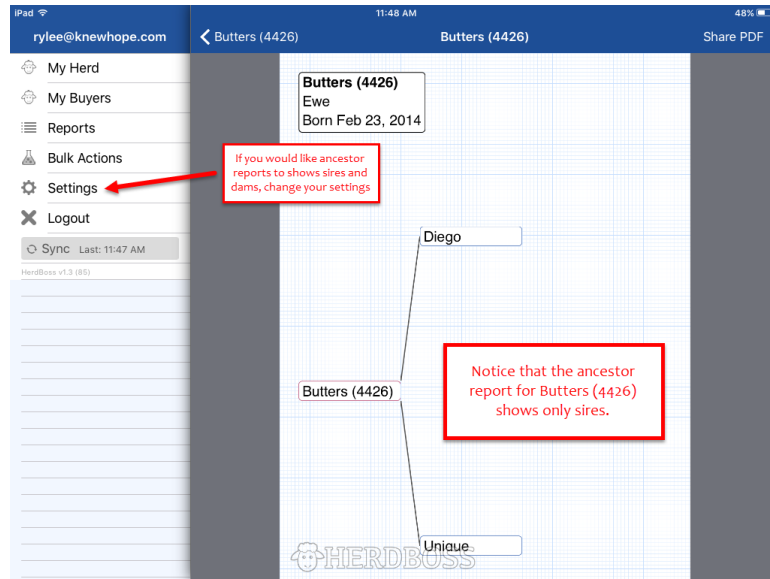
## Sharing Reports

- 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

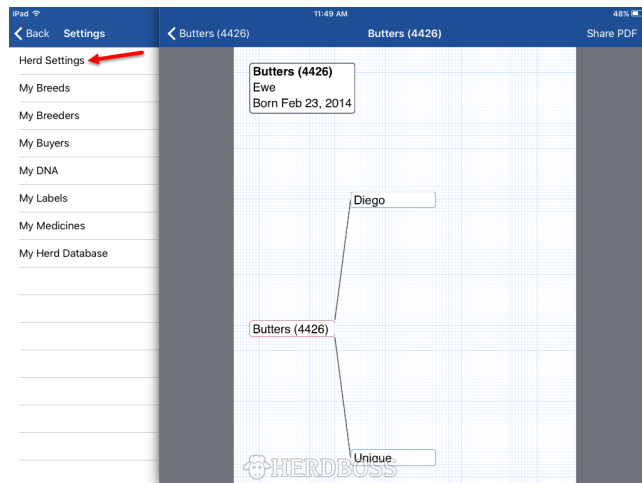


## Sharing Ancestor Reports

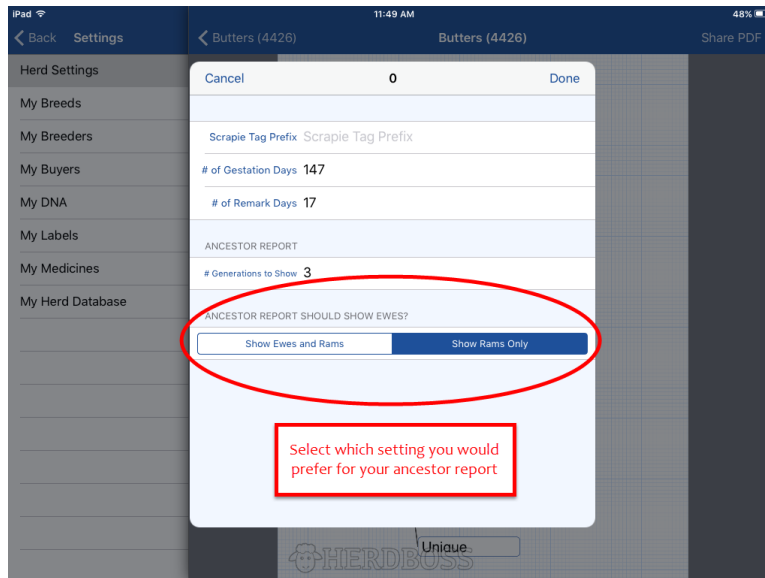
- 1) “Search” and select the sheep whose ancestry you would like to view, scroll down looking for the section titled History, and tap “Share PDF Report.” When the report appears, find and tap “Share PDF” in the upper right hand corner
  - a. You can adjust the default report settings to show only rams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



- b. Then, select “Herd Settings”



- c. 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](mailto:theteam@herdboss.com)