CattleMaxCS

Printed Manual

Contents

Welcome To CattleMax CS

Cattlesoft, Inc. is pleased to present CattleMax CS, software designed for commercial and registered cattle operations of all sizes. With CattleMax, you can maintain your cow, bull, and calf inventory, medical treatments, calving histories, and performance records such as animal weights, carcass data and more. CattleMax also has extensive reporting to assist in herd analysis.

How Do I ...

Back up my herd file?

1. Open CattleMax CS.
2. Click the Office Button in the top left corner of the screen.
3. Select "Backup Herd File".
4. Chose the backup location (ideally an online system, CD or flash drive) when the CattleMax Backup screen pops up, then click "Backup".

NOTE: It is very important that backups are made on a regular basis and that they are not stored on the same computer as the CattleMax system. If your backups and CattleMax are stored on the C: drive (hard drive) and the C: drive crashes, you will have lost not only your current herd file but all of your backups as well.

Reinstall CattleMax on a new computer?

1. First, save a backup of your current herd file from your old computer onto a CD or flash drive.
2. Install CattleMax on the new computer.
3. Register and activate the new computer.
4. Restore the backup onto your new computer by clicking the Office Button > Restore Backup File. Then, locate the file on your online backup service, CD or flash drive. Click “Open”, then “Restore”.
5. Open your herd file on the new computer by clicking the Office Button > Open Herd File. Locate your herd file and click “Open”.

Copy my herd file from an older version of CattleMax?

1. Open CattleMax CS.
2. Click the Office Button in the top left corner of the screen.
3. Select Convert > Convert Herd File From Previous Version.
4. Find and open the Cattlesoft folder; this is normally on the C: Drive.
5. Find and open the folder for the older version of CattleMax. This will be CattleMax 2006 or CattleMax (for Version 1 and Version 2).
6. Open the folder that contains your herd file. This folder is called "Data" for the 2006 version and "Herd" in older versions). Double-click on your most recent herd file to it into CattleMax CS.
7. Verify the file to be converted is in the "File Name" box, then click "Save".
8. Now follow the on-screen directions to finish the conversion process.

Activate my CattleMax?

To activate CattleMax, click on the Settings tab, then click the "Activate CattleMax" icon on the right side of the ribbon. Follow the on-screen instructions from there. **The ranch name MUST match the ranch name on the receipt EXACTLY.** If you have problems, contact customer service and we will be happy to help you.

Enter a new animal?

You can enter a new animal from either the Bull, Cow, or Calf List or Details screen.

Click "Add New" and the Add New animal screen will appear. All that is required to add a new animal is the primary means of identification (ear tag, brand, EID, etc.) and the date of birth, which may be an estimate.

Other options for accessing the Add New screen include: On the Home screen, under "Purchases and Acquisitions" or "Calving".

Promote a heifer calf to a cow, or a bull calf to a bull?

Click the "Replacements" icon on the CattleMax Home screen and select from one of the four promotion options.

Or, in the Calf Details screen, click the "Change Status" link under the Record Activities heading in the left side of the screen, and select "Promote" from the menu.

Demote an animal from Bull or Cow back to a calf?

Go to the animal's detailed record screen, then click "Change Status" under the Record Activities heading on the left side of the screen. Select "Demote" from the pop up menu.

Delete an animal?

Go to the animal's detailed record screen, then click "Delete Animal" under the Record Activities heading on the left side of the screen. We recommend you delete an animal **ONLY if it is a duplicate record, or the animal does not really exist**. Normally, you would want to set the animal's status to “Inactive”, rather than deleting, for animals that are dead or have been sold.

Change an animal's status to inactive or dead?

Go to the animal's detailed record screen, then click "Change Status" under the Record Activities heading on the left side of the screen. Select the new status from the pop-up menu.

Or, click "Sales and Removals" on the Home screen and select the correct option.

Sell an animal?
There are a couple of ways to sell an animal. You can click the "Sales and Removals" icon in the Financial section of the CattleMax Home screen, or you can go to the animal's detailed record screen, click "Change Status", then "Record Sale" in the Record Activities area on the left toolbar.

Whichever choice you make, the "Cattle Sales" screen will be displayed. If you are adding animal(s) to an existing sales ticket, you will need to select the sales ticket from the drop menu under "Find Sale Ticket". Otherwise, click "Add New Sale Ticket", and enter the new sales ticket information in the drop menu.

To add cattle to your ticket, click "Add/Edit Cattle On Ticket" and the Edit Sale Ticket screen will be displayed. Choose the animals to be added to the ticket from the "Active Cattle In The Herd" box on the left side and move them to the "Cattle On Sale Ticket" box on the right side. The Ticket Details screen will be displayed, where you can record the sales details.

When an animal is sold, the status will be changed to “Inactive/Sold” and the sales information will be displayed on the animal's General tab in their individual record.

Remove an animal from a sales ticket and make it active again?
There are two options:

1. Click the "Sales and Removals" icon in the Financial section of the CattleMax Home screen.
2. Pull up the individual animal record for the animal you want to remove. To do this, make sure you have the box next to "Inactive" checked under the Cattle to List heading, and locate the animal's record. Click the "Change Status" link and select "Record Sale" from the menu.

Select the sales ticket the animal was entered on, then locate the animal to be removed from the ticket. Click "Remove" on the far right column of the animal's sale line.

The animal will be removed from the sales ticket and their status will be changed back to “Active”.

Register an animal with a breed association?
Click the "Management" icon on the CattleMax Home screen and select "Breed Association Interfaces" from the pop up menu. Select your country and breed association from the interface list. Under the field "Choose an Interface Option", select "Print Registration Applications" or "Electronically Register Cattle", depending on the abilities of your association, and click "Next". All cattle with this breed entered into the breed field on their General tab, with no registration number listed, will be displayed. Select the animals you want to register and follow the on-screen instructions. *Note: Your membership number must be recorded into the contact record for your ranch in order for it to be displayed on the registration form.*

Add a picture to an animal's individual record?

First, we suggest you create a file called "Pictures" in the CattleMax CS folder on your hard drive, with sub folders called "2007 Cattle Pictures", "2008 Pictures", etc. Then move all your herd pictures to these folders.

To add a picture to an animal's record:

1. Go to the animal's individual record and select the Pictures tab.
2. Click "This Animal", then "Add New".
3. Enter relevant information such as Category, Date and Comment.
4. Click on the folder icon to the right of the "Location" box. Locate and select the picture you want to use. If you follow the suggestion above for the picture folders, the location should be similar to this: "C:\Cattlesoft\CattleMax CS\Pictures\2007 Cattle Pictures\picturename.jpg".
5. Click "Save" and "Close".
6. The picture should now be displayed on the Pictures tab. Click "Use As Primary" to have the selected picture display throughout the individual animal record, and on any reports you choose to include pictures.

Export a report to an Excel file?

Select the External Data tab on the ribbon toolbar. Click the "Excel" icon in the Export section of the toolbar. In the Export To Excel screen, click the down arrow beside the Record Area box, select the report you want to create, and click "Next".

Select the columns you want to appear on the report from the list on the left side of the screen, and click "Add" to move them to the right side of the screen. Reverse this process to remove columns from the report. Click "Next" when all columns have been selected or unselected.

If you would like to filter for certain criteria, you will enter this information on the next screen. For instance, If you only want calves born in 2008 to show in your report, you can filter for "Date of Birth". In this example, enter "01/01/08" in the From field, and "12/31/08" in the To field. Other examples of filters you may want to include are "Pasture" and "Sire". Click the down arrow in the "Filter Where" box to select the field you want to filter for. To sort the animals in your report in a certain order (for example, ascending ear tag numbers), click the arrow in the "Sort By" box to select the sort sequence, then click "Next". Choose the name for your export file, then click "Finish".

Configure and use an EID Reader?

Configure: Connect your EID reader to your computer through your serial port. Select the External Data tab on the ribbon toolbar, then click the down arrow beside the "EID Readers" icon in the Equipment section of the toolbar. Select "Configure", and enter the manufacturer and model of your EID reader, and the com port it is connected to.

Connect: Open the Bulls, Cows, or Calves Details screen, then select the External Data tab on the ribbon toolbar. Click the down arrow beside the "EID Readers" icon on the right side of the ribbon. Select "Connect to RFID Reader", and you should get a successful connection message.

Use: Scan an EID tag, and the number will appear in the "Last EID" field in the EID Reader Interface. Choose "Find an animal with this EID", "Set EID for this animal", or "Add a new animal with this EID". Repeat these steps for each tag you scan.

Configure and use a weigh scale indicator?

Configure: Connect your weigh scale to your computer through your serial port. Select the External Data tab on the ribbon toolbar, then click the down arrow beside the "Weigh Scales" icon in the Equipment section of the toolbar. Select "Configure" and enter the manufacturer and model of your scale indicator, and the com port it is connected to.

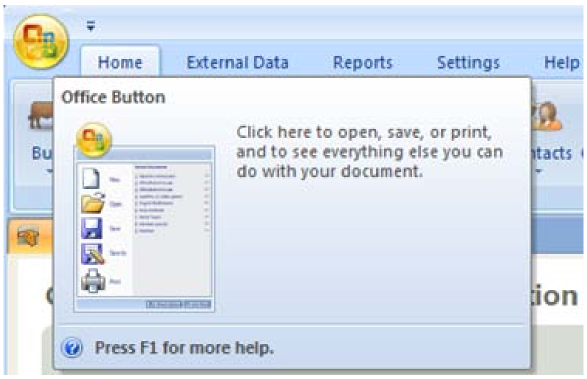
Connect: Open the Bulls, Cows or Calves Details screen, then select the External Data tab on the ribbon toolbar, and click the down arrow beside the "Weigh Scales" icon on the right side of the ribbon. Select "Connect to Weigh Scale", and you should get a successful connection message.

Use: Weigh an animal, and press the button on your indicator to record the weight. The weight will appear in the "Last Weight" field in the Weigh Scale Interface. In the Actions tab, select "Record Weight for Current Animal". Repeat these steps for each weight you need to record.
Note: An animal must already have an individual record in CattleMax before you can enter a weight.

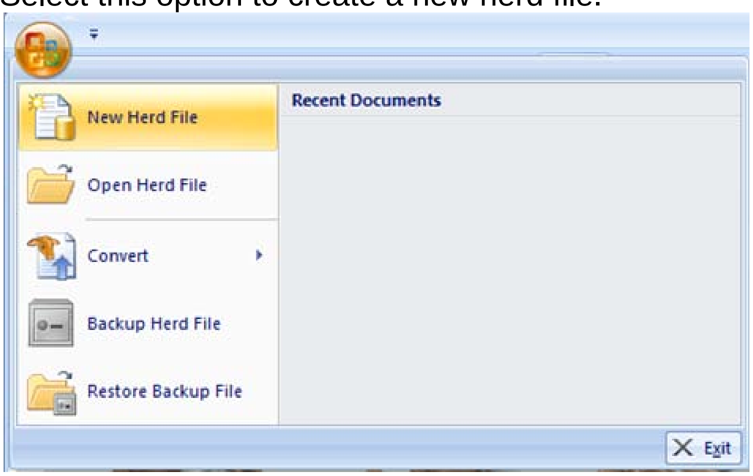
Navigation

The Office Button

The Office Button is located in the upper left corner of CattleMax CS. It is used for managing your herd file functions, such as creating a backup or new herd file, or converting your herd file from a previous version.

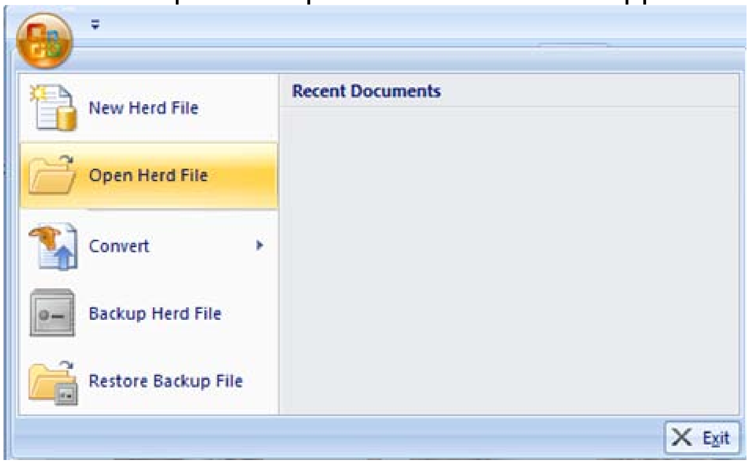


New Herd File
Select this option to create a new herd file.



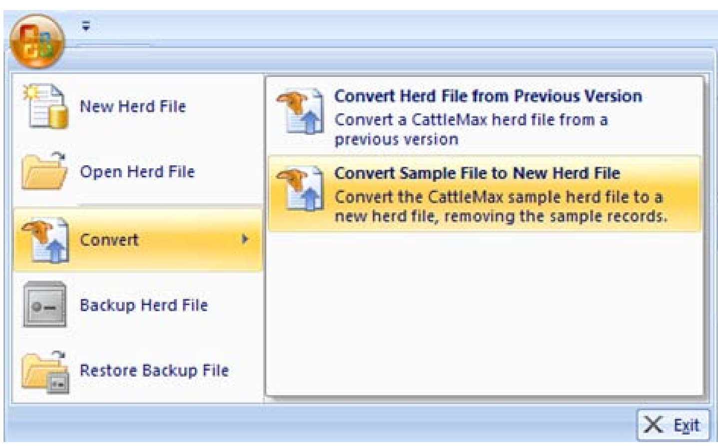
Enter the new herd file name into the File Name field, and press "Enter". The Ranch Interview will assist you in customizing the new file. The preferences are specific to each herd file, so if you have multiple herd files you can have separate preferences for each herd.

Open Herd File
Select this option to open a herd file. It will appear on your screen as your current working file.



In the Select a CattleMax Herd File screen, double-click on the herd file you want to open, and it will load into CattleMax.

Convert Sample File
To convert the Sample file into a working herd file, click "Convert", then select "Convert Sample File to New Herd File". This process will copy any information you entered into the sample file into a new herd file, and delete the original sample animals included when you installed CattleMax.

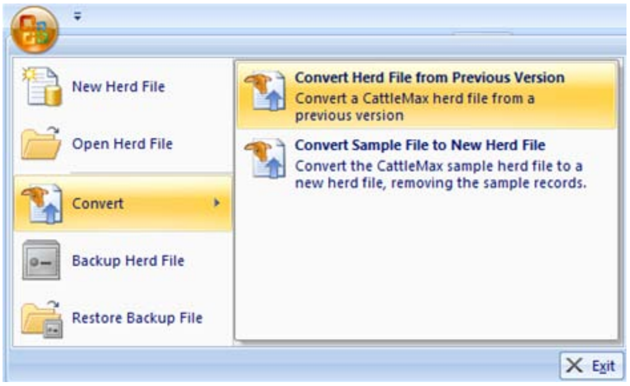


Enter the name of the new file into the File Name field, and click "Save".

After converting the file, click the Office button and select "Open Herd File". Then select the herd file name you just created.

Convert Herd File From Previous Version

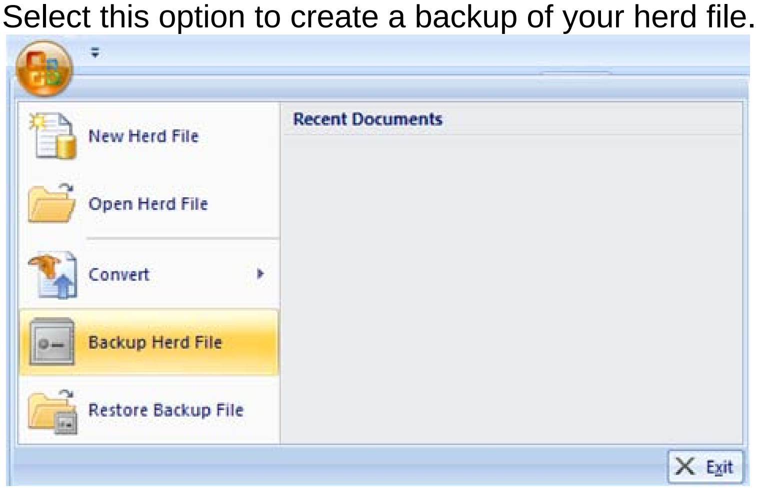
Select this option to convert your herd file from CattleMax 2006 or other previous versions. Click the Office Button, then choose "Convert". Select "Convert Herd File from Previous Version".



1. Select Cattlesoft from your C: drive, then select your previous version of CattleMax (CattleMax 2006, CattleMax2 or CattleMax1).
2. Select the Data folder for version 2006, or the Herd Folder for versions 1 and 2. Double-click the most current herd file.
3. Click "Open", then follow the on-screen directions.

Backup Herd File

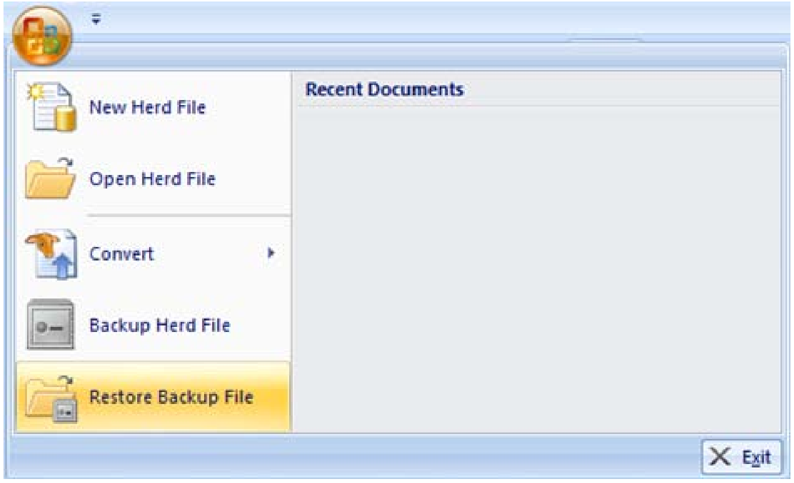
Select this option to create a backup of your herd file.



Chose the backup location (ideally an online service, CD or flash drive) when the CattleMax Backup screen appears, then click “Save”.

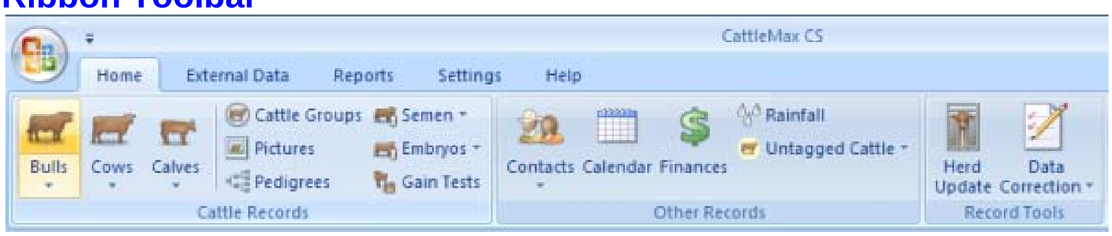
NOTE: It is very important backups are made on a regular basis and not stored on the same computer as the CattleMax system. If your backups and CattleMax are stored on the C: drive (hard drive) and the C: drive crashes, you will have lost not only your current herd file, but all of your backups as well. We suggest storing backups on online backup system, CDs, flash drives, or in email.

Restore Backup File
Select this option to restore a backup from a previous date. If you want to retain the current herd file you are working in, be sure to create a new backup before restoring your previous herd file.



1. Click on the folder to open the "Select a Backup File to Restore" screen.
2. Find the file, double-click on it, and then click "Open". You will receive a "Successfully Restored" message.

Ribbon Toolbar



The narrow row of text options (Home, External Data, Reports, Settings and Help) and the wide row of picture icons (Bulls, Cows, Calves, Cattle Groups, Pictures, etc) is collectively called the ribbon toolbar.

For more information about each option in the toolbar, move your mouse over the icon and an information box will appear.

Home Toolbar

<u>Cattle Records</u>

Bulls

The "Bulls" icon opens the individual bull records (with tabs such as General, Details, Breeding, etc., for each animal). The down arrow below the "Bulls" icon displays the options to "View Bull List" and "View Bull Details".

"View Bull List" will display the bull records in row format and enables you to search for records by your chosen animal identification methods. You can also customize the columns to display in this view by clicking the "Customize view" link in the upper right of the Bull List screen.

"View Bull Details" goes directly to the individual bull records, where you record information such as breeding, performance measurements and medical treatments.

Cows

The "Cows" icon opens the individual cow records (with tabs such as General, Details, Breeding, etc., for each animal). The down arrow below the "Cows" icon displays the options to "View Cow List" and "View Cow Details".

"View Cow List" will display the cow records in row format and enables you to search for records by your chosen animal identification methods. You can also customize the columns to display in this view by clicking the "Customize view" link in the upper right of the Cows List screen.

"View Cow Details" goes directly to the individual cow records, where you record information such as breeding, offspring and medical treatments.

Calves

The "Calves" icon opens the individual calf records (with tabs such as General, Details, Pedigree, etc., for each animal). The down arrow below the "Calves" icon displays the options to "View Calves List" and "View Calf Details".

"View Calves List" will display the calf records in row format and enables you to search for records by your chosen animal identification methods. You can also customize the columns to display in this view by clicking the "Customize view" link in the upper right of the Calves List screen. Choosing "View Calf Details" goes directly to the individual calf records, where you record information such as weights, pedigree and medical treatments.

Cattle Groups

This is a management tool that enables you to identify cattle by a common characteristic, such as "Spring Calves", "Registered Cattle", “Breeding Cows”, etc., for working with records and reports. Cattle Groups are helpful when using the filter function in Herd Update or Reports to help narrow your list of cattle. You can place cattle in as many different groups as you like.

Pictures
View and add pictures for your cattle to track growth or use as a means of identification.

Pedigrees (Registered Edition)
View and add 3- and 5-generation pedigrees for your cattle. Any offspring of cattle with records in CattleMax will automatically reflect the pedigree information from their sire and dam records. This means once you enter all of your cow herd information, and pedigrees for any sires you use, your calf pedigrees will be automatically completed.

Semen
The "Semen" icon displays two options: "View AI Bulls" and "View Semen Tanks". Choose "View AI Bulls" to list records by bull, and choose "View Semen Tanks" to list records by tank.

Embryos (Registered Edition)
The “Embryos” icon has two options: "View Donor Cows" and "View Embryo Tanks". Choose "View Donor Cows" to list records by cow, and choose "View Embryo Tanks" to list records by storage tank.

The option to "Enable Embryo Transplant (ET)" must be selected in order for the "Embryos" icon to be displayed. You can check this option by selecting the Settings tab in the ribbon toolbar, clicking the "Preferences" icon, and selecting the “Preferences” tab.

Gains Tests
Record and view gains test information for your cattle, which is also displayed in the individual animal records.

<u>Other Records</u>
Contacts
The "Contacts" icon opens the individual contact records (with tabs such as General, Notes, Sold To, etc., for each contact). The down arrow below the Contacts icon displays the options to view "Contacts List" or "Contact Details". "Contacts List" displays the contact records in row format and enables you to search for records by contact information, such as last name or company name. You can also customize the columns to display in this view with the "Customize view" link. "Contact Details" goes directly to the individual contact records, where you can view and add contact information and any cattle transactions you may have had with them.

Calendar
The Calendar feature is where you can record tasks, view upcoming events and set task reminders.

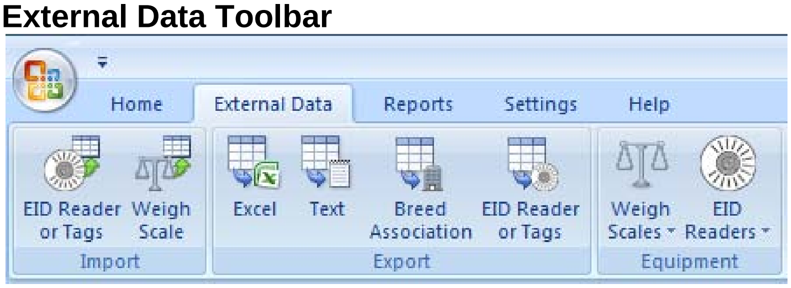
Finances
Record and view income and expense entries, and even choose an individual animal to link to the income or expense entry, which will automatically be displayed in their individual animal record under the Financial tab.

Rainfall
View and track rainfall data, including date and amount, by any time period you wish.

Untagged Cattle
The "Untagged Cattle" icon displays two options: "Calf Groups" and "Stocker-Feeder Groups". Choose "Calf Groups" to record calves you will manage as a group (not individually identified). Choose "Stocker-Feeder Groups" to record details for calves you are holding in a stocker or feeder operation.

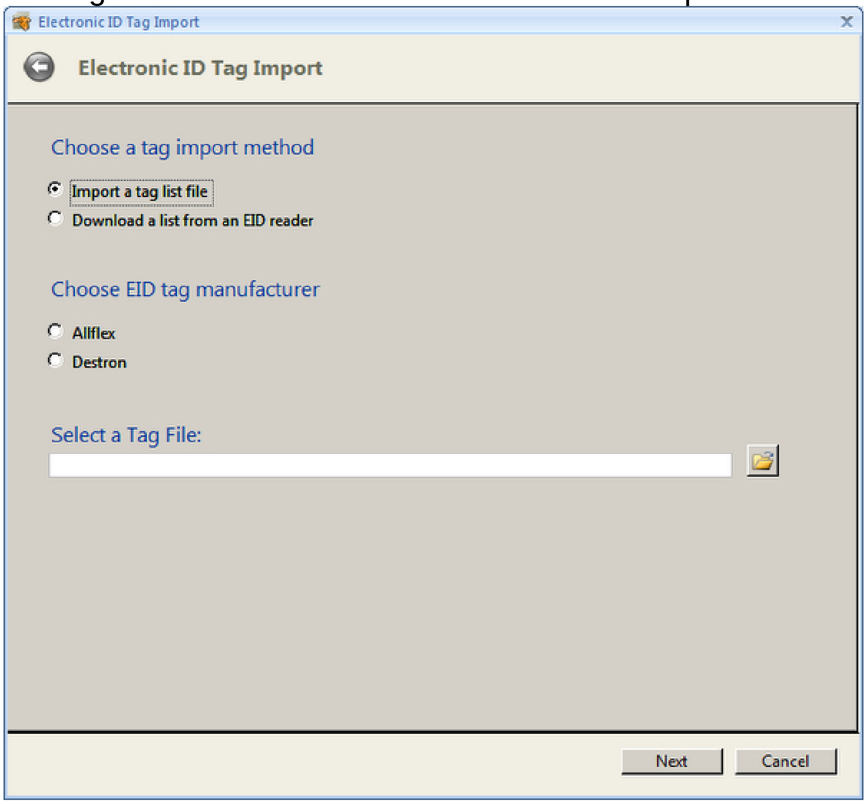
Record Tools
Herd Update
Record information for a group of cattle, such as pasture movements, medical records, branding, cattle promotion for replacements, and more. You can update multiple record areas for a group of cattle all at once, and the information automatically transfers to their individual cattle records.

External Data Toolbar



Import
Provides interfaces to import information from EID readers, weigh scale indicators, or spreadsheet files with tag numbers and/or weights into CattleMax.

EID Reader Or Tags
“Import a list from a file created by a tag vendor, EID reader, or in MS Excel” imports a list of EID tags into CattleMax from an external file in spreadsheet format.



1. Select the EID tag file you need to import, then click “Next”.
2. Enter which columns have the relevant tag information, then click “Next”.
3. Assign the EID tag number as the Visual ID in CattleMax, then click “Next”.

“Download a list from an EID reader connected to this computer” enables you to download scanned tag numbers from your EID reader (if it has a memory capability). You must first configure and connect your reader.

Weigh Scales
Import a weight file into CattleMax from your weigh scale indicator or a spreadsheet file on your computer.

If importing from your indicator’s memory function, you must first connect your indicator to your computer and save the scale file (see your equipment manual for these instructions). Then, select the manufacturer of your weigh scale indicator, and locate the file on your computer. Assign the matching identification and weight criteria, if they are options in your manufacturer's interface.

If importing from a spreadsheet file, simply locate the file saved on your computer, and enter the corresponding identification and weight information, then click “OK” to import the weights.

Export

Create and export reports into Excel or Text files outside of CattleMax, use your Breed Association Interface, and export EID tag information.

Excel

Create a custom report with the columns you choose and export it to a Microsoft Excel spreadsheet file (.xls or .xlsx) for further calculations.

1. Select a record area from which to create the export file.
2. Select the fields to be included as columns in the export file.
3. Assign the export file name and location.
4. Open and format the Excel file from its location on your computer.

Text

Create a custom report and export it to a Comma Separated Text File (.csv). This may be useful for transferring information to an association or company database.

1. Select a record area from which to create the export file.
2. Select the fields to be included as columns in the export file.
3. Assign filter criteria and sort order, if needed.
4. Assign the export file name and location.
5. Open and format the Text file from its location on your computer.

Breed Association

A special feature for registered breeders available only in the Registered Edition, the Breed Association Interface enables you to work directly with your breed association. You can export electronic registration files, or create printed registration applications, through our extended selection of breed association interfaces. The interface capabilities depend on the association you are working with. To view the Breed Association Interfaces Guide (which provides details about completing the forms), select the External tab in your ribbon toolbar, then click the "Breed Association" icon. Or, you can access the feature from the CattleMax Home screen through the "Management" icon.

1. Select your breed association and the function you would like to perform, such as “Print Registration Applications”. The options available depend upon the association’s ability to work with electronic records.
2. Select the animal records you need to work with.
3. Confirm and review the file.
4. Print or email the report as needed.

EID Reader Or Tags

Export EID tag information to different file formats in other locations on your computer. Simply select the location and file name, and the type of cattle, and your tag list will be exported to the chosen location on your computer for you to open and work with.

Equipment

Weigh Scales

Configure and connect your weigh scale indicator to download weights in real-time. You must first connect your indicator to your computer's serial port, and identify which com port it is connected to (see your equipment manual for these instructions).

To configure your weigh scale indicator, select your manufacturer, model and com port from the drop menus. If this information is correct, and your indicator is connected, just click "Connect to weigh scale".

Go to the Bulls, Cows, or Calves Details screen (depending on the animals you are working with), then set up the ID to match the weight to, the type of weight and date. Weigh the animal, press the button on your indicator to record the weight, and it will appear on your CattleMax screen. Click "Record weight for current animal", and the weight will be transferred to the individual animal record.

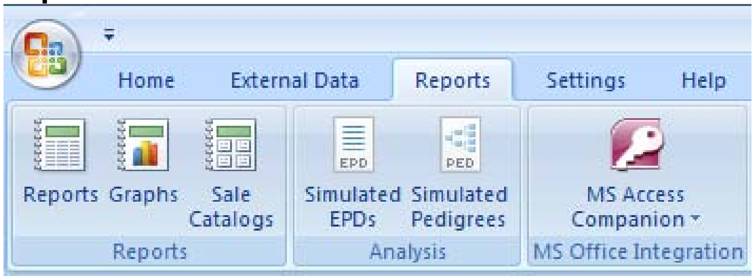
EID Readers

Configure and connect your EID reader to download tag numbers in real-time. You must first connect your reader to your computer's serial port, and identify which com port it is connected to (see your equipment manual for these instructions).

To configure your reader, select your manufacturer, model and com port from the drop menus. If this information is correct, and your reader is connected, just click "Connect to RFID Reader".

Go to the Bulls, Cows, or Calves Details screen (depending on the animals you are working with), then select the action to be performed from the options listed: "Find an animal with this ID", "Set EID for current animal" or "Add a new animal with this ID".

Reports Toolbar



Reports

Preset Reports

This feature contains a list of commonly used preset reports we have provided as a foundation for your cattle reporting and analysis.

Customizable Lists
Most of the preset reports can be fully customized with the Customizable Lists feature. Select the preset report you want to customize, and click the "Customize List" link in the upper right of the report screen when it opens. You can then select the fields to be displayed as columns on the report. You can also filter the report for a certain criteria such as status, date range, age, pasture, etc. You can include totals and averages for numeric columns, or even group data together and produce totals for each group. You can sort any field by ascending or descending order, and select fonts and shading for each report.

Graphs
There are four preset graphs: Bull Inventory by Age, Bull Inventory by Breed, Cow Inventory by Age, and Cow Inventory by Breed

Sale Catalogs
The Sales Catalog function helps you create customizable, printable pages to list cattle you may have for sale. It may be posted on your website, printed to use at an upcoming sale, or just to show ranch visitors. The first page will include your brand, contact information and an index summary of the cattle in the catalog.

You may select from five sales catalog format options for each animal's record: Individual Picture, Individual Picture and Extended Marketing Comment, Individual Picture and Pedigree, Individual Picture (Sire and Dam) and Pedigree, and Individual Picture (2-Generation) and Pedigree.

There are also seven formatting options for displaying the animal entries on each page:
4 head per page (quadrants), 4 head per page (rows), 2 head per page (columns), 2 head per page (columns) and Extended Marketing Comment, 2 head per page (rows), 8 head per page, and Picture Thumbnails.

Select the options you want for your catalog, then click "Next". Select the animals to include in the catalog, then click "Next" again. Select the sort order and enter a title for the sales catalog. Click "Preview" to display the report.

From the preview screen, you may print the catalog, save it as a PDF file, or email it to addresses in your CattleMax contacts.

<u>Analysis</u>
Simulated EPD's
Calculate possible calf EPDs based on selected sire and dam records.

1. Select the EPD to calculate.
2. Select the cows.
3. Select the sire(s) to compare. To select more than one sire, hold the "Ctrl" button on the keyboard as you click them in the list.
4. Click "Finish" to calculate the EPD. The predicted EPDs from the matings you selected will appear on the report.

NOTE: If a value is blank, the bull or cow is missing the selected EPD in their individual animal record.

Simulated Pedigrees
This feature, only available in the Registered Cattle Edition, will display the pedigree for a selected sire and dam mating to help determine which animals with favorable characteristics would be included in the new genetic composition.

MS Office Integration
MS Access Companion
To use this feature, you must have Microsoft Access installed on your computer, as it will open an actual Access database file. It requires some knowledge of how Access works. The MS Access Companion is included automatically in the CattleMax CS version.

What the Companion does:
This feature enables the user to modify any report, including preset reports, using Microsoft Access. It contains the Report Wizard, which enables you to completely create your own reports from scratch. It also allows for the extraction of data from queries, as well as the creation of new queries and reports.

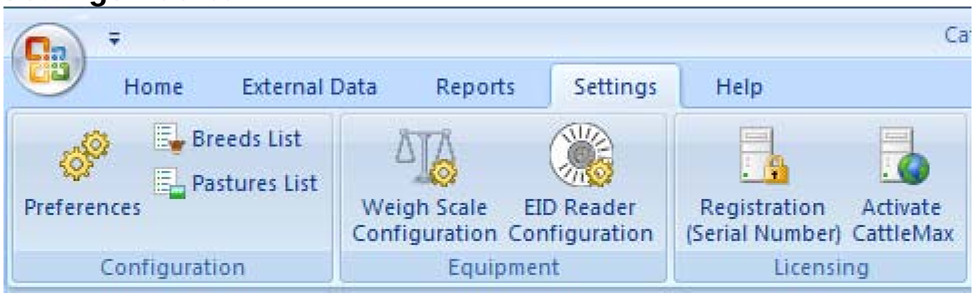
What the Companion does not do:
This feature is strictly for reporting or extracting data. Data entry or modification is restricted and only allowed through the regular CattleMax interface.

Who should use this Companion:
Only users who need to modify reports in ways that cannot be done in CattleMax, and who have experience with Microsoft Access should use this feature.

Getting help--Important!
This feature is optional and is **NOT** supported by Cattlesoft beyond the Report Wizard. You must be careful in editing the reports and queries. Because anything you change modifies the structure of CattleMax and is out of our control, using the Companion may affect the usability of CattleMax. Therefore, by clicking the "I Agree" button in the disclaimer, you concede the consequences of using the Companion to modify any objects such as reports or queries and understand Cattlesoft will not provide technical assistance on the Companion or Microsoft Access, nor provide assistance due to any modifications made to CattleMax from using the Companion. For more information on how to edit reports in Access, please see the Access User Guide which comes with your Microsoft Access software, or other available resources. We suggest creating a backup of your herd file before doing any extensive work with the MS Access Companion.

The Good News:
You may always reinstall CattleMax, which will repair any modified objects. You will not lose any custom reports you have created, but all modified preset reports and queries will be restored to their original (default) configuration and any new queries will be lost.

Settings Toolbar



<u>Configuration</u>
Preferences
Customize your CattleMax CS settings and preferences, such as enabling or disabling certain features, recording your ranch contact information and uploading your ranch logo, and setting up your custom fields.

Breeds List
Add or remove breeds you use in the software and update breed association information.

Pastures List
Here, you can maintain information that is specific to a ranch or pasture (such as type of land and ownership costs). In addition, you can view cattle currently located in a pasture and record pasture notes.

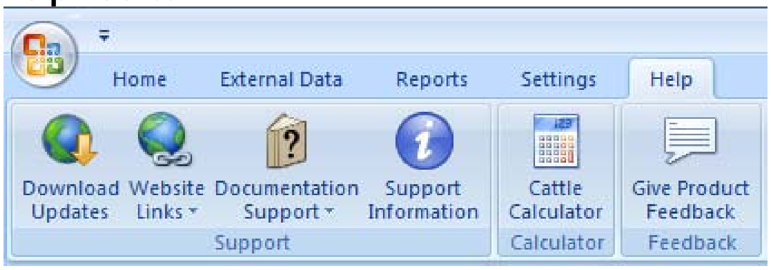
<u>Equipment</u>
Weigh Scale Configuration
Configure your weigh scale indicator to use in the real-time interface.

EID Reader Configuration
Configure your EID reader to use in the real-time interface.

<u>Licensing</u>
Registration Serial Number
Enter your ranch name and serial number to register the software. The ranch name MUST be entered EXACTLY as it appears on your receipt.

Activate CattleMax
Click here to activate CattleMax. Each computer running CattleMax must be activated. Remember, your CattleMax purchase is only licensed for use on one computer. Contact us or visit the ordering section of our website to purchase an additional license for $50.

Help Toolbar



The following Help options can be accessed on the Help tab in the ribbon toolbar:

Download Updates
Use this button to download the current CattleMax CS update from the CattleMax website. You should be notified when updates are available through the CattleMax newsletter, or a message when you open CattleMax on a computer with an Internet connection.

Website Links
This icon has a direct link to the CattleMax website home page and The Cattle Pages—an online directory for the cattle industry.

Documentation Support
Printable Help Manual: Choose this option to print the help manual. The file will open in Microsoft Word and will appear similar to the built-in help file.

Quick Start Guide: The Quick Start Guide gives an overview of CattleMax CS and how to get started. Topics covered include how to enter your serial number (registration), create a new herd file, and other important startup steps.

Breed Interface Guide: If you have registered cattle, this explains how CattleMax interfaces with the various breed associations.

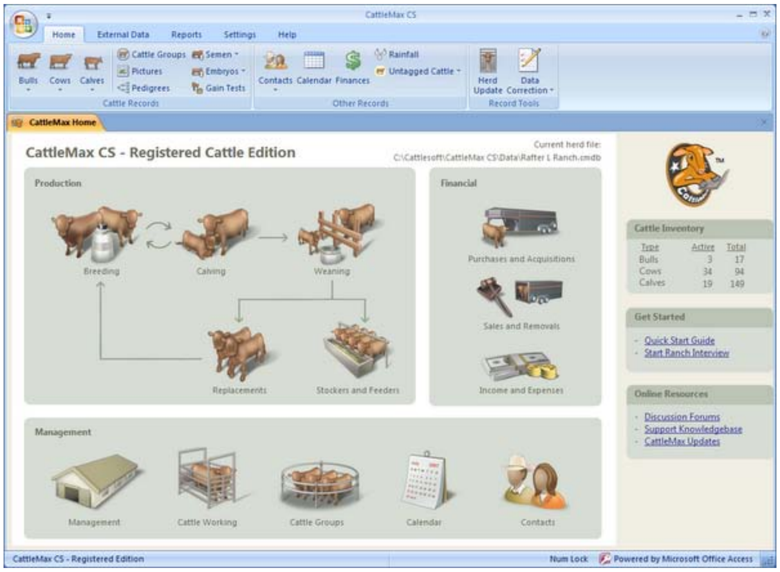
Update Notes: This helpful guide lists the CS version notes that explain the new features, enhancements and bug fixes that were included in each update.

Support Information
This section has information that is helpful when contacting customer service. It contains license and version information you might be asked for, links to our support websites, and customer service contact information.

Cattle Calculator
This handy tool has several calculations that are helpful to ranchers.

Give Product Feedback
Provide feedback on CattleMax for questions, suggestions or to tell us what you like.

Home Screen



The CattleMax Home screen displays the most common record areas and features in CattleMax. It also states which edition (Registered or Commercial) you are using, the name of your current herd file, and your cattle inventory.

The Home Page is displayed in four sections:

- Production
- Financial
- Management
- Helpful Information

Home Screen Icons

Helpful Information

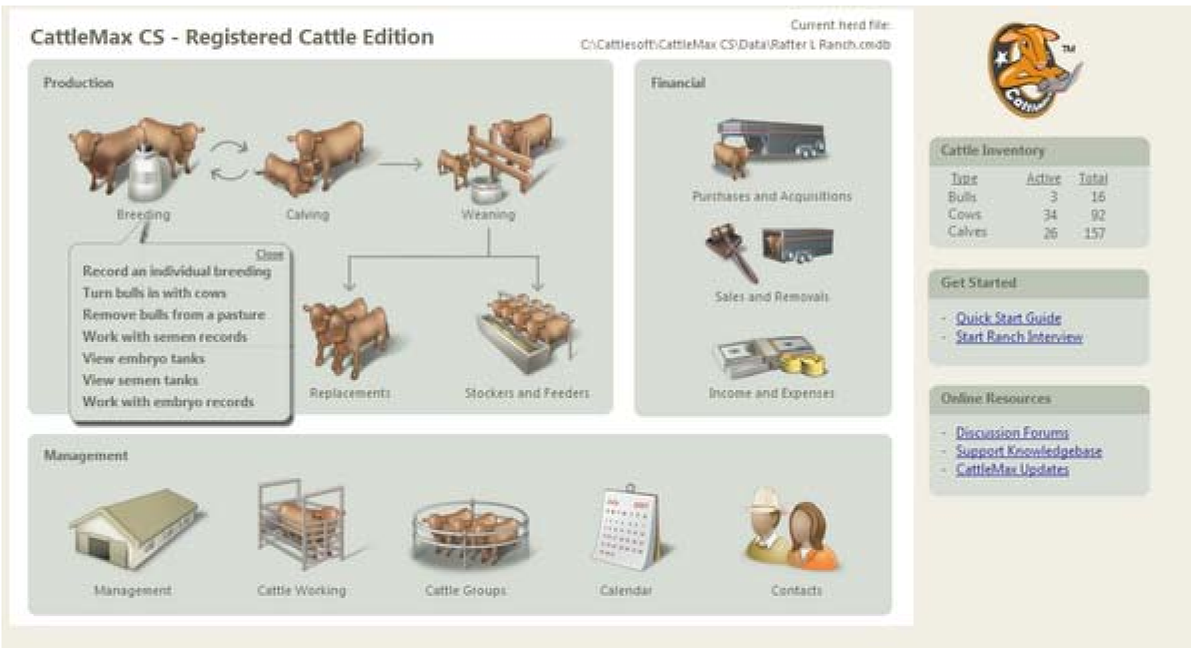
Cattle Inventory
Displays a list of active and inactive bulls, cows and calves in the current herd file.

Get Started
Has resources for new CattleMax users, such as suggestions for entering your initial cattle records.

Online Resources
Links to resources on the Internet, such as our customer support page and discussion forums. These links will automatically open the pages in your web browser.

Production

Breeding
Options include recording individual breeding records, bull exposures and managing AI and ET information.



<u>Record an individual Breeding</u>
Select the cow from the drop down menu, then select the production year (if you use them) and the type of breeding (NS, AI or ET). Record the following information, depending on the type of breeding:

- *Natural Service* - Enter the Start and End dates, select the bull from the Bred To drop menu and enter a comment if desired.
- *Artificial Insemination* - Enter the AI Date and Units, select the bull from the drop menu and enter a breeding comment if desired.
- *Embryo Transfer* - Enter the ET Date, Embryo ID, CL Type Side, and breeding comment if desired.

Turn In Bulls With Cows
Record the date bulls are turned in to a pasture. All cows located in the pasture will be marked "exposed" to this bull in their breeding records.

1. Select the Bull(s) to be turned in.
2. Record the Ranch, Pasture and Turn In Date.
3. The bull's location record will be updated, and the cow's breeding records will be marked "exposed".

Remove Bulls From Pasture
Use this transaction to remove bulls from pasture at the end of breeding.

1. Select the bull(s) to be pulled.
2. Record the Ranch, Pasture and Pull Date.
3. The bull's location information will be updated.

Work With Semen Records
Maintain your semen inventory, sales and AI bulls; complete with an auto-deduct feature to ensure your semen count is always accurate.

Click the "Add New" to add new semen units to your inventory. Click the "Edit" to modify the selected record. Click the "Delete" to remove the selected semen inventory record.

View Embryo Tanks
View and track your overall embryo inventory and manage storage tanks.

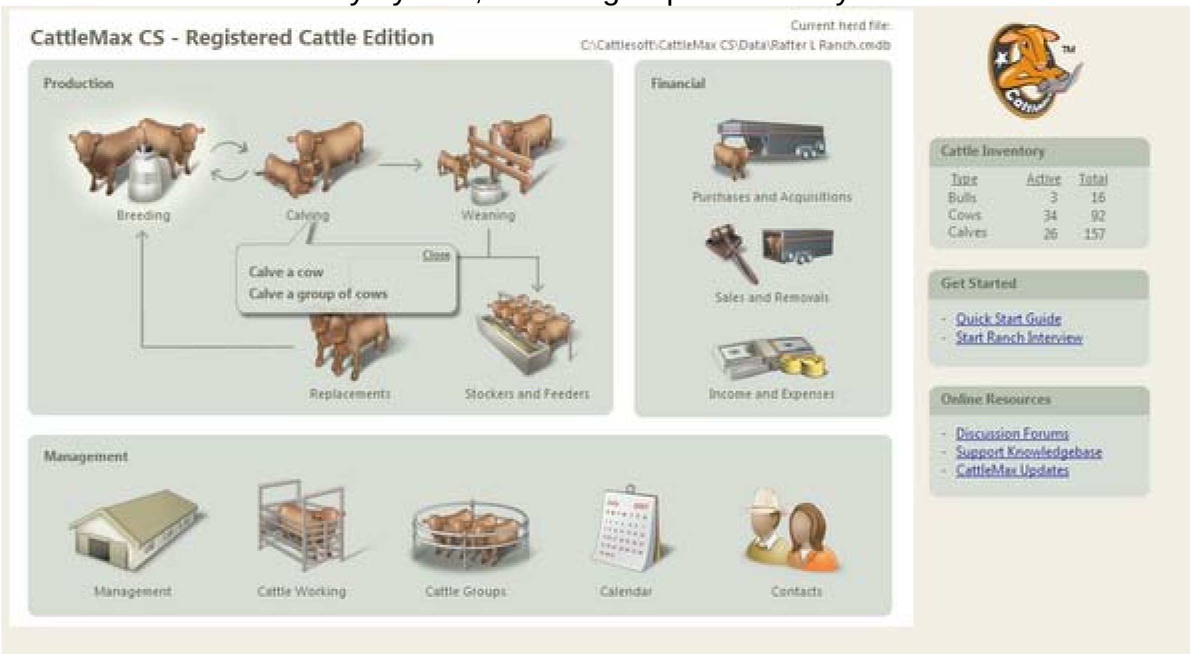
View Semen Tanks
View your overall semen inventory and manage storage tanks.

Work With Embryo Records
Maintain your embryo inventory. This contains all of your embryo information by donor cow. You have the option of adding a single embryo or of adding multiple embryos.

Click the "Add New" to add a new ET record. Click the "Edit" to modify the selected record. Click the "Delete" to remove the selected ET record.

Calving

Record calves individually by cow, or for a group of cows if you use an estimated date of birth.



Calve a cow

The Add New Calf screen will appear. A primary identification and date of birth are the only required fields to add the new calf. When you select the dam on this screen, her Offspring and Breeding tabs will be updated.

Calve a group of cows and add records for their calves

1. Select the cows that have calved.
2. Enter the calving details.

The individual cow records will be updated, and their offspring added to the Offspring tab. The individual calf records will be added to CattleMax.

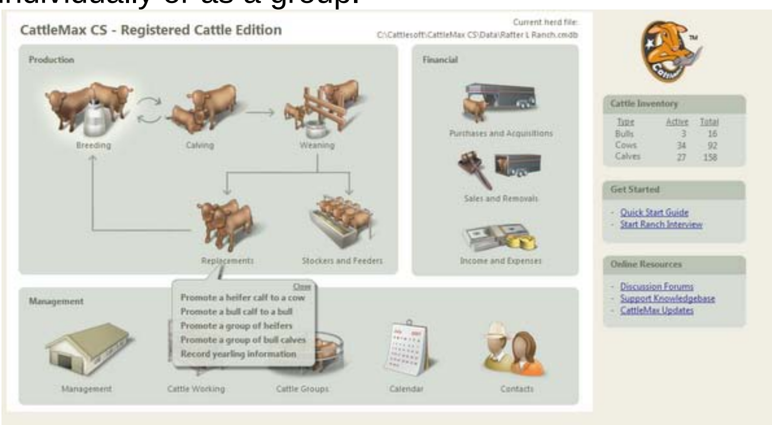
Weaning

Record weaning information, including weights, individually or for a group of calves.

Wean an Individual Calf
Enter the weaning information for a single calf here.

Wean a group of calves
1. Select the calves to be weaned.
2. Enter the weaning date and weights.
3. The individual calf records will be updated.

Replacements
Record calves being kept for the mature herd as replacement heifers or developing bulls individually or as a group.



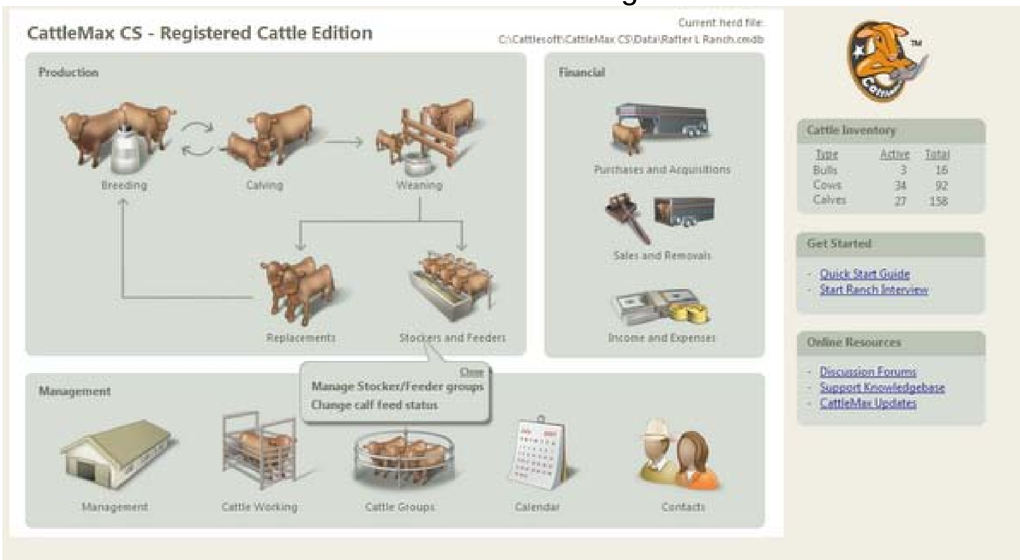
Promote Heifer Calves to Replacement Heifers
1. Select the calves to promote.
2. Verify the heifers to be promoted.
3. Enter promotion date and category.
4. The individual heifer records will be promoted to Replacement.

Promote Bull Calves to Developing Bulls
1. Select the bulls to be promoted.
2. Enter the promotion date and new category.
3. The individual bull records will be promoted.

Add yearling information for a group of calves
1. Select the calves to update.
2. Enter the yearling date and weights.
3. The individual records will be updated.

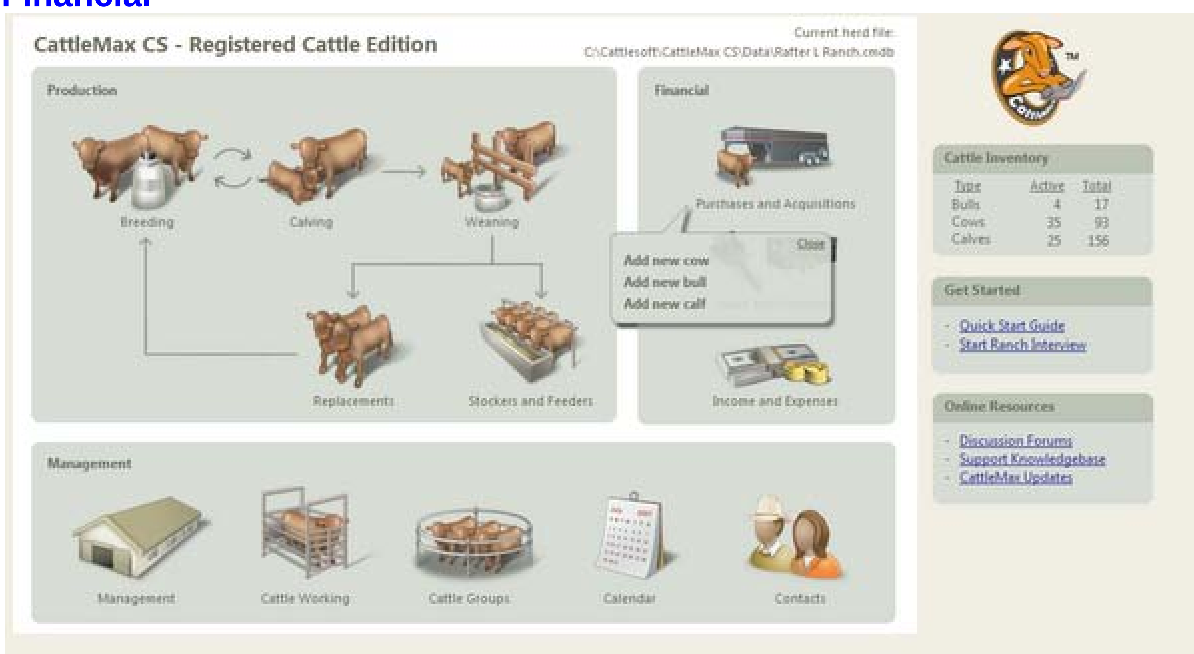
Stockers and Feeders

Record stocker/feeder information and change calf feed status.



Select this option to maintain stocker/feeder group records for animals you wish to track on a group/lot basis rather than through individual records. To add a new group, click "Add new group". To remove the selected group, click "Delete group".

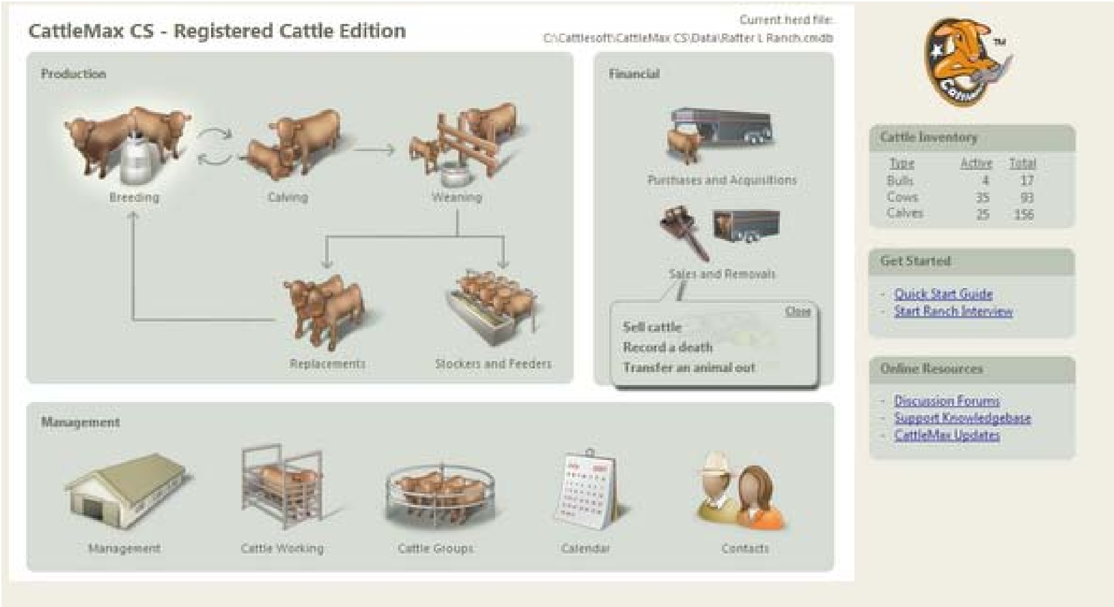
Financial



Purchases and Acquisitions

Add new cattle records for animals entering the herd.

Sales and Removals



Sell Cattle

This option creates a Sales Ticket and marks the animals added to the ticket as "sold", changing their status to "Inactive". To create a sales ticket and record cattle sales, go to the CattleMax Home screen, then click the "Sales and Removals" icon.

Once an animal is added to a sales ticket, it is marked as "sold", the sales information is updated on its General tab, and it's status is changed to "Inactive". To remove an animal, simply click "Remove", and the animal will be returned to "Active" status and removed from the sales ticket.

Creating a Sales Ticket

1. Click "Add New Sales Ticket" to add a new sales ticket.
2. Enter the sales information.
3. Select the cattle being sold, then click "Next".
4. Enter the sales price of the animals.
5. Click "Add Marketing Expenses" to account for sales expenses.

Record a Death

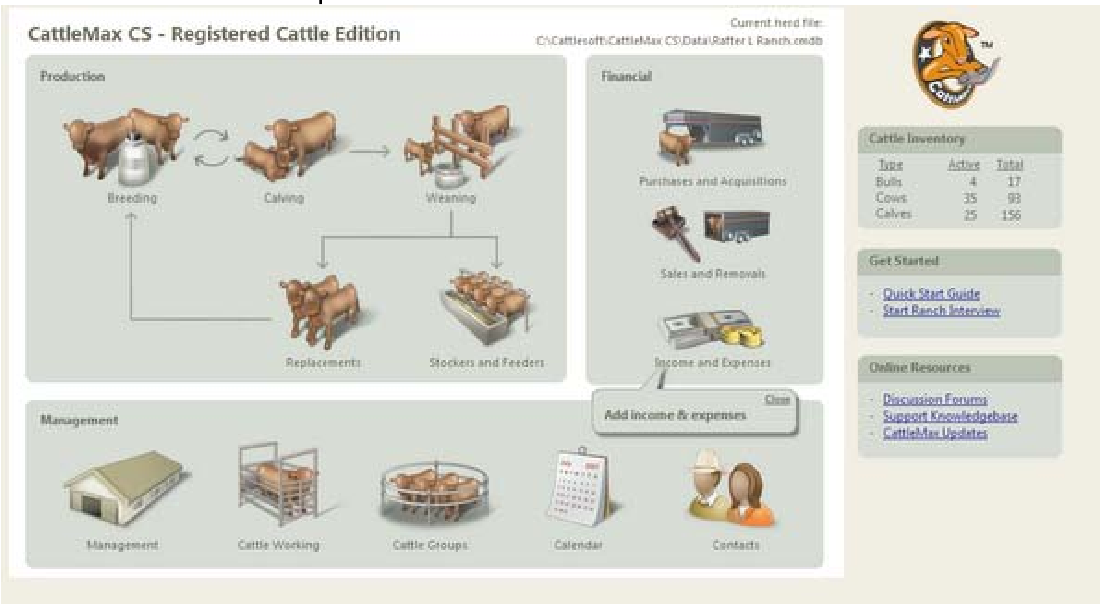
Use this option to reported an animal as dead, and change its status to "Inactive".

Transfer an animal out

This option enables you to transfer an animal out of your herd for other reasons, and changes their status to "Inactive".

Income and Expenses

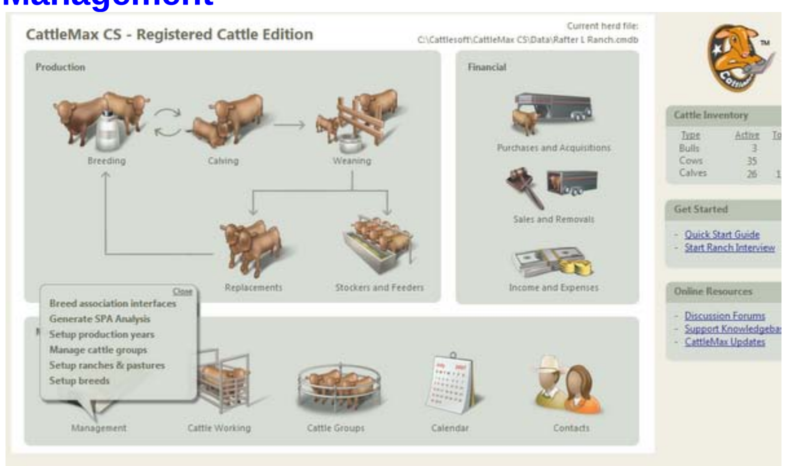
Record income and expenses for the ranch as a whole or link them to individual animals.



The Finances section keeps a log of income and expenses to record these entries for your ranch. This feature is designed to provide a basic income and expense log that can be categorized and totaled for reports. For more in-depth financial analysis, we recommend an accounting program such as QuickBooks.

You can link income and expenses directly to a contact, or to an individual animal. These records will also appear in the Contacts section and the individual cattle records.

Management



Management

<u>Breed association interfaces:</u>

A special feature for registered breeders available only in the Registered Edition, the Breed Association Interface enables you to work directly with your breed association. The interface capabilities depend on the association you are working with and may include: printing registration applications, submitting applications electronically, receiving a herd inventory download, receiving updated EPDs from the association.

To begin working with the Breed Association Interface, (which provides details about completing the forms), click the "Management" icon on the CattleMax Home screen.

Generate SPA Analysis:
Calculate production measures on your herd for the Standardized Performance Analysis (SPA).

Setup production years:
Production years can be used in CattleMax CS to accommodate and maintain the comparison of each cow's yearly production records (breeding and pregnancy/palpation results). The use of production years is certified by the NCBA (National Cattlemens Beef Association) to calculate production measures needed for SPA (Standardized Performance Analysis).

Examples of when production years should be enabled:

- You divide your cattle into distinct breeding and calving seasons (i.e., spring and fall calving)
- You maintain palpation results and want to keep historical palpation records
- You want to maintain production records for SPA

Manage cattle groups:
Provides a way to group similar records for reporting and quicker updating.

Setup ranches & pastures:
The Ranches and Pasture Setup screen enables you to maintain information about your ranches and pastures, such as the current utilization and a list of the animals currently in that location.

New Ranch
To add a new ranch, click "Edit List of Ranches", then "Add New". You will be asked to enter the name of the new ranch.

Delete Ranch
To delete a ranch, click "Edit List of Ranches", then select the ranch to delete, and click "Delete". Deleting the ranch will also remove the pastures within that ranch. Click "Yes" to confirm. Select "No" to cancel the action.

Add New Pasture
Click "Add New Pasture", then select the ranch the pasture is located on, and enter the pasture name(s).

Delete Pasture
To delete a pasture, select the pasture name in the "Find Pasture" field, then click "Delete Pasture" to confirm you want to delete the selected pasture.

The Cattle In Pasture tab
Shows which cows, bulls, and calves are currently located in the selected pasture, and provides a count of each animal type at the top of the screen.

Pasture Notes
View or add new notes on the selected pasture (i.e., bad fence, good winter pasture, etc.).

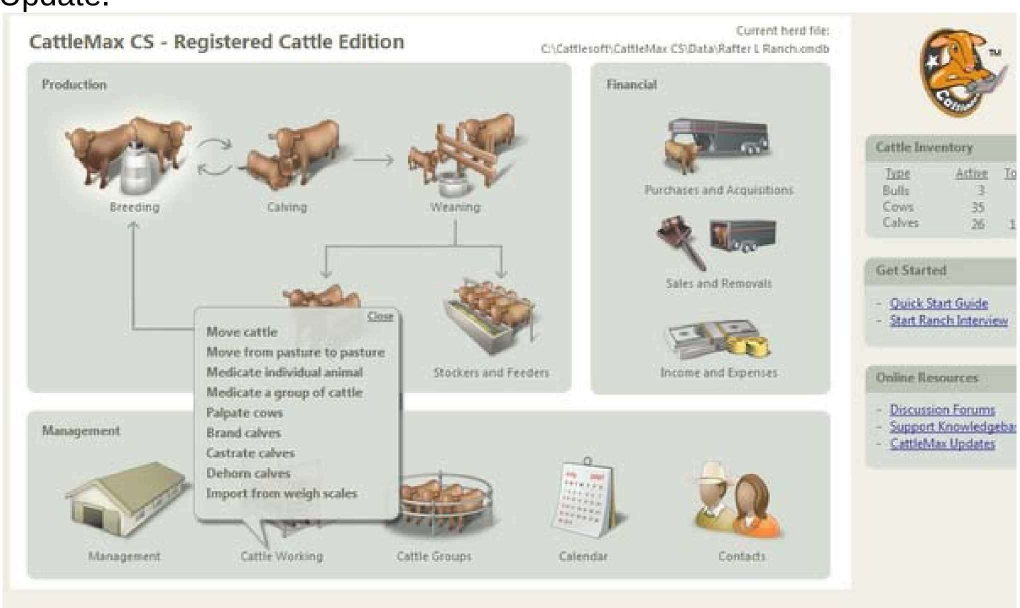
<u>Setup breeds:</u>
The Breeds List screen enables you to specify which breeds you work with to reduce the choices in drop menus when you add cattle.

To access this feature, select the Settings tab in your ribbon toolbar, and click the "Breeds List" icon in the Configuration section.

Here, you can view and adjust default values based on the animal's breed. The Breed Association Codes section will only list options the selected association accepts. These code boxes will appear on the Details tab in the individual animal records to be completed on the breed association registration applications.

If you raise cattle of a certain breed but do not want to use the association's codes, choose "<No Association Specified>" in the Breed Association Code box.

Cattle Working
Many tasks can be performed here, most of which are for a group of animals, through Herd Update.



<u>Move cattle</u>
1. Select the cattle to be moved. Select the cattle from the Active Cattle In the Herd box on the left, and click "Add" to move them to the Cattle To Update box on the right, then click "Next".
2. Select the destination Ranch and Pasture from the drop menu.
3. Click "Next" to update the selected cattle records with their new location.

Move from pasture to pasture:

1. Select the existing Ranch and Pasture.
2. Select the destination Ranch and Pasture.
3. Enter the Movement Date, then click "Next".

Medicate Individual Animal

Record a medical procedure performed on a single animal in their individual records.

Medicate a group of cattle

1. Select the animals to be medicated
2. Enter the treatment information.
3. The treatment information will be transferred to the individual cattle records.

Palpate cows

1. Select the cows that have been palpated.
2. Enter the palpation details. You have the option of marking all of the animals as palpated bred. The "Date Bred" field will automatically be calculated and the palpation details will be updated in each cow's breeding record.
3. The individual records will be updated.

Brand calves

Brand a single animal or multiple cattle in a single transaction.

1. Select the animal or group of animals to be branded.
2. Enter the brand information.
3. The individual record(s) will be updated.

Castrate calves

1. Select the calves to update.
2. Verify the calves to be castrated.
3. The calves will be marked "steers" in their individual records.

Dehorn calves

1. Select the calves to dehorn.
2. Verify the calves to dehorn.
3. The individual calf records will be updated.

Import from weigh scales

Import a weight file into CattleMax from your weigh scale indicator.

1. You must first connect your indicator to your computer and save the file to a location on your computer.
2. Select the manufacturer of your weigh scale indicator.
3. Locate the file from your indicator on your computer to import the weights from, and then assign the matching identification and weight criteria, if they are options in your manufacturer's interface.

Cattle Groups

The Cattle Groups feature enables you to group similar records together for navigation and reporting. For example, you want to create a group for your "2008 Hereford Heifers". By creating a group with that name and designating cattle in that group, you can easily create reports that only list the cattle within that group.

To access the Cattle Groups feature to designate your groups, click the "Cattle Groups" icon in the Cattle Records section of the Home tab in your ribbon toolbar. Or, click the "Management" icon in your CattleMax Home screen, and select "Manage cattle groups".

Working with the Groups

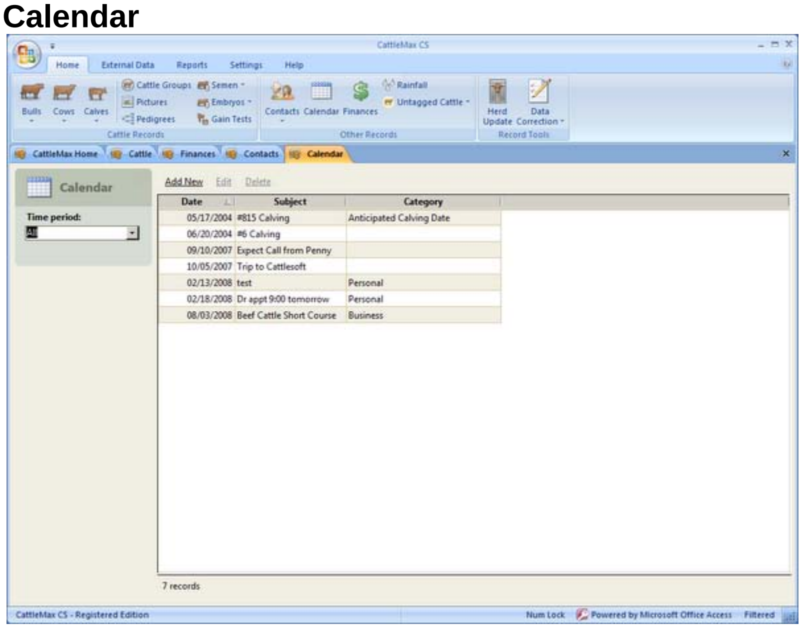
Click "Add New Group" under Record Activities to create a new group. Click "Delete Group" to remove a group from the list. This will only remove the group name - the cattle records will not be deleted from the software.

Adding Cattle to a Group

Click "Add/edit cattle in group" under Cattle Groups Tools to add or remove cattle from the selected group. A cattle selection screen will appear where can select the cattle to add from a list.

Check all types of cattle you want to appear in your selection list at the top of the Edit Cattle Group screen, then select the cattle to add to the new group. Click "Add" between the boxes to move the cattle to the new group.

Calendar



With the Calendar, you can view and schedule events and appointments, and set task reminders.

<u>Add Event</u>

To add a new event, click "Add New". Enter the task or event name and date.

Category
This box is customizable so you can enter categories and use them as needed. When a new category is entered, it will be added to the list for future use.

Completed
If you have completed the task, check this box. The Task Completed list will be updated.

Description
Enter a brief description of the event, or any notes you want to record for the task. To create a report that lists your tasks, go to the Reports section (Reports tab>Reports icon), and select the "Calendar - Tasks and Reminders" report from the list.

Contacts
The Contacts section helps you maintain and manage contact information, transactions and notes for breeders, customers and suppliers.

<u>Record Activities</u>
Click "Add New Contact" to add a new contact record. Click "Delete Contact" to remove the selected contact record.

<u>Contact Tools</u>
Print Mailing Labels
Click "Print Mailing Labels" to open the Print Mailing Labels screen. Select the Contacts from the left side of the screen to appear on your labels. If you have a long list of contacts and only want to print labels for contacts in a specific category, you can use the filtering options to narrow your list. Click "Apply Filter" to select your criteria. For example, if you want labels for contacts you have flagged as breeders and located in Texas, type "Is Breeder" in the Information to Filter box, then enter "Primary State" in the second filter box that appears. Select "TX" from the next box that appears on the screen, then click "OK".

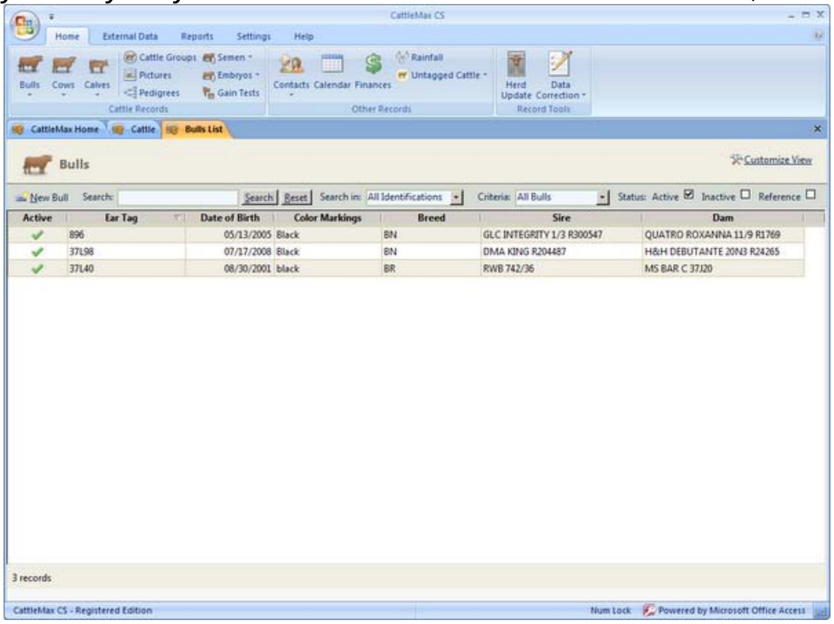
Once you have the contacts you need selected, click "Add" to place them in the Contacts to Include on Labels box, then click "OK" to print your labels.

Send Group Email
Send the same E-mail message to all or selected contacts. Once again, you can apply a filter to reduce your list.

Cattle Records

Bulls

Bull List
The Bull List displays a list of all of your bulls, according to your specifications. For example, you may only want to view bulls with an Active status, or those from a certain group.



The Bull's Status, Ear Tag, Date Of Birth, Color Markings, Breed, Sire and Dam are displayed by default. You can add or remove columns to this screen by selecting the "Customize View" link. Double-click an animal in the list to view the detailed invidual records for the bull.

To sort the Bulls List by values in a certain column, simply click in the column heading. You may choose to sort them from fields such as "Ear Tag" or "Date of Birth" to list them by age. You will see a small arrow appear on the right side of the heading, showing whether it is sorted in ascending or descending order. Click the heading again to reverse the sort order.

<u>New Bull</u>
Click this button to display the Add a New Bull screen.

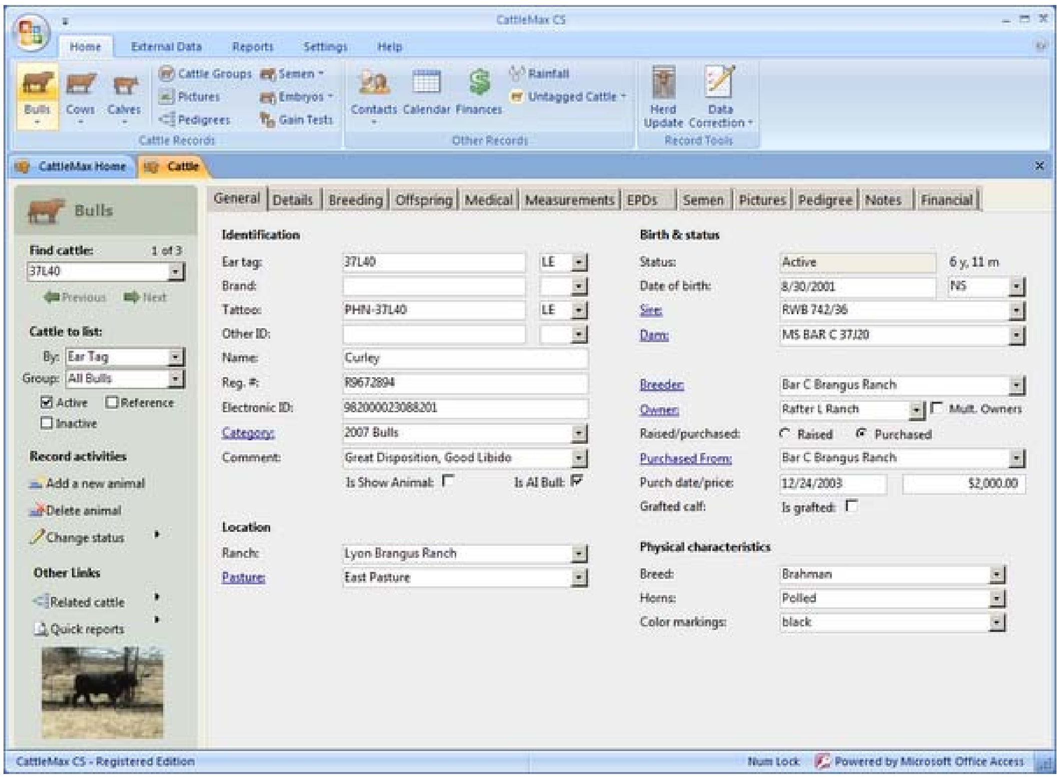
<u>Search</u>
Allows you to search the list for a specific animal. When the animal is found in the list, it will be displayed at the top of the screen. This is helpful when you have a long list of cattle and know the specific record you need to view.

<u>Reset</u>
Resets the search criteria and returns you to the first bull in the list.

<u>Search In</u>
Specifies which identification field in the bull's record to look for a match. For example, this might be "ear tag" or "brand"

Criteria
This allows you to display all bulls or select by group or production year.

Status
You can display the bulls by status of "Active" (default), "Inactive", or "Reference". You may select one or all three.



Bull Selection Area
The light green area on the left lists the primary ID of the current bull and includes links to record tasks for that animal, and has options for selecting and listing other bulls.

Find Cattle
Displays the primary means of identification for the current bull displayed. Enter the primary ID for a certain bull into this field to go directly to their individual record, or locate them in the drop menu.

Cattle to List
By
Select which form of identification you want the bulls listed by in the Find Cattle box.

Group
Shortens the list of bulls in the Find Cattle box to display only bulls from a selected group or production year.

Status
Select which bulls you want to appear in the Find Cattle box from the Active, Reference and Inactive options. Select "Active" to display only active bulls currently in your herd. If you work mainly with AI bulls not in your herd, you may want to have "Reference" or "Inactive" selected, depending on how you categorize them.

"Reference" will display bulls that have never actually been in your herd, but are included in the pedigrees of some of your cattle.

"Inactive" will display bulls that were formerly in your herd, but have died, been sold or transferred out.

<u>Record Activities</u>
Add a New Animal
Brings up the Add a New Bull screen to create an individual record for a new bull.

Delete Animal
Use this to delete the current animal (not recommended unless this is a duplicate record). This brings up a warning screen suggesting you change the status to sold, dead, or transferred out rather than deleting the record.

Change Status
Includes several options to record an animal’s new status in the herd, such as sold or dead, without permanently deleting its record.

<u>Other Links</u>
Related Cattle
Quickly shows offspring, extended offspring, maternal and paternal siblings.

Quick Reports
Provides quick links to various combinations of picture and pedigree reports.

The main body (tan area) of the Bulls Detail view lists information specific to the individual animal. There are up to 12 tabs for each bull, depending on your edition (Registered or Commercial), and whether each bull has been marked as an AI bull or show animal.

Bull General Tab

<u>Identification</u>
The identification methods and the primary visual ID can be changed in your Preferences (Settings>Preferences>Preferences). Enter the identification of the animal, which can include text, numbers and/or characters. The boxes to the right of ear tag, brand, tattoo, and other ID are to record the location of the identification.

Location

If the bull is currently located on your ranch, you will see the Ranch and Pasture boxes to select a new location.

If the bull is not located on your ranch, type in the location (such as a breeding center). You will be prompted to add the location to the contact list if it is not already recorded there.

If you have "Enable Pasture and Category Histories" enabled in your Preferences, CattleMax will automatically keep a log of movements (such as on 7-15-2008 cow 1 was moved from Main Ranch Front Pasture to Lease Place Hay Meadow.) Click the Pasture link to quickly view the individual animal's movement history. An entry will be recorded when the pasture is changed on the General screen or through Herd Update.

Birth & Status

Status

Records the current status of the animal (Active, Sold, Dead, Reference). Location information will appear for active cattle, and disposition information will appear for dead or sold cattle. Click the "Change Status" link on the left side of the screen to change this information.

Date of Birth

Enter the animal's date of birth. If you are estimating the animal's age, you can put the month and day as January 1. For example, if you estimate that an animal is 6 years but are not sure of the exact date of birth, enter January 1 and the estimated year. The current age of the animal is automatically calculated to the corresponding date of birth.

Birth Method

Select the birth method of the animal (Natural Service, Artificial Insemination or Embryo Transfer). If the birth method is selected as embryo transfer, a donor dam box will appear below the birth method box. Select the donor dam of the animal. If the dam is new to the list, you will be prompted to add the cow's record.

Sire/Dam

Choose the sire/dam of the animal, or type in a new entry to add to the list. Click the Sire/Dam links to view general information about the animal. Placing the cursor over the word "Sire" or "Dam" will display the sire or dam's picture if you have added pictures to their individual records.

Breeder

Select the breeder of the animal or type in a new entry to add to the list. The breeder is usually the owner of the dam at the time of calf conception, which may be your ranch if you raised your own herd sire.

Owner

The owner is the person or ranch who currently owns the animal. In most cases, this will be your ranch.

Mult. Owners

Check this box if your bull has multiple owners. Click "View Owners" to enter the multiple ownership information. This feature is in the Registered Edition only.

Raised or Purchased
Choose whether the animal was raised or purchased. If the animal was purchased, the "Purchased From" and "Purchase Price" fields will appear. If the animal is raised, and you have the Registered Edition, you will only see the "Asking Price" field.

Grafted Calf
If a calf is being raised by a cow other than the calf's natural mother, check this box. A Genetic/Donor Dam box will appear below the Dam to indicate the cow that gave birth to the calf. The Dam box is to indicate the cow that is currently raising the calf.

<u>Physical Characteristics</u>
Breed
Select the breed of the animal or type in a new entry to add to your Breeds List. You may select which breeds to display from "My Breeds" in your Preferences.

Horns
Indicate the horn status of the animal: "Dehorned", "Horns", "Polled" or "Scurs".

Color Markings
Use the color markings area to give a physical description of the animal.

<u>Disposition Information</u>
Sales Information
The sales information displayed is based on the record entered in the Cattle Sales area. The sales information can only be viewed here, not changed. If you see an error, go to "Sales and Removals" from the CattleMax Home screen to make a correction.

Death/Transfer Information
Enter the date the animal died ("Date Removed From Herd"), the cause of death ("Cause of Removal"). If the reason is unknown, enter "Unknown". Click the "Change Status" link on the left side of the screen to record an animal sale, death or transfer out of the herd, or to correct a status.

Details
<u>Breed Composition</u>
Indicate the bull's breed and percentage composition of each breed for commercial crossbred bulls. To enter a new breed or composition breed not included in the drop menu list, add the breed to your Breeds List (accessible from the Settings tab in the ribbon toolbar).

CattleMax can automatically determine a calf's breed composition based on the sire and dam, as long as they have correct breed composition entered on their Details tab. Ensure the "Automatically Calculate Breed Compositions" feature is enabled in your Preferences for this to work. (Click the Settings tab in the ribbon toolbar, then click the "Preferences" icon. Under the Preferences tab, make sure the box is checked next to "Automatically Calculate Breed Compositions".)

Breed Association Codes
These are only displayed if "Enable Management and Association Codes" is selected in your Preferences. This area contains boxes to record various codes specific to breed associations. The codes are based on the breed of cattle and the association you have chosen.

Marketing
Includes fields for Asking Price and Marketing Comments, which are displayed on the Sales Catalog.

Custom Fields
Custom fields are fields you can customize to meet your ranch's specific record keeping needs. To change the label of the box, click on "Customize Custom Fields". You will have ten alphabetic and ten numeric fields to customize. For example, many producers who are using DNA or GeneStar testing use the custom fields to record this data.

Breeding
Service Record
Records the date the bull was turned in, the date the bull is pulled, the number of cows exposed, the ranch and pasture name. To add a service record for a bull and natural service records for a group of cows, choose the "Turn In Bulls" option in the Herd Update screen, accessible from Home tab in the ribbon toolbar, or from the "Breeding" icon on the CattleMax Home screen.

To record the ending date for a bull's service record a cow's natural service breeding record, use the "Pull Bulls" option in Herd Update.

A natural service breeding record will be created for all cows in the pasture at the time the bull is turned in. The breeding record contains the date the bull was turned in and an expected due date for a calf resulting from the breeding.

Breeding Soundness Exam
This section records the results of a breeding soundness exam performed on the bull. This enables you to keep track of each soundness exam to watch breeding possibilities and breeding performance history.

Additional columns may be added to the screen by clicking the "Customize View" link and selecting the additional fields to want to appear as columns on your screen.

Offspring
The Offspring tab lists a history of all of the calves the bull has sired.
Calves are automatically added to this list when they are entered in the software, as long as the sire is selected. Each of the offspring also has its own record in CattleMax, and is listed under the Offspring tab for their respective dam.

Click the "Add New" link to record a new offspring. Click the "Customize View" link to select the fields displayed as columns on your screen.

Medical
The medical treatment screen contains all recorded medical procedures that have been performed on the animal. This information can be entered here for a single animal or through Herd Update for a group of cattle. Additional columns may be added to the detail lined by clicking the "Customize View" link and selecting the additional fields you want to appear as columns on your screen.

OCV
Stands for Officially Calfhood Vaccinated against Brucellosis.

The OCV Tattoo
This field contains the OCV tattoo number.

The OCV #
This field contains the OCV ear tag number.

<u>Medical Records</u>
To add a new medical record, click "Add New". Click "Edit" to modify a selected record. To remove a record, click "Delete".

Category
This is to group similar medical treatments. Example categories include "Birth Vaccs" and "Reproductive".

Medication
New medications entered here will be added to the list for future reference. Once they are added, you will be able to select them from a drop menu, rather than typing the name in again.

Withdrawal/Booster Date
Record these dates if applicable. Animals that fall within a Withdrawal Date will have a **red** warning appear on the General Tab when the animal is viewed, to avoid any mistaken sales.

Route/Location
Choose the description that best fits the given treatment. Click the question mark button to view a diagram of the location options.

Cost
The per head cost for the treatment.

Measurements
The Measurements screen includes weights, contemporaries, carcass data, and gains test. The Herd Update feature can be used to record birth, weaning and yearling records.

<u>Performance Measurements</u>
The Calf Measurements screen will already be complete for bulls you raised and entered the calf information for in CattleMax. It will remain in their record when they are promoted to a bull. Instructions for entering those records are included below:

Contemporaries and Ratios
Use Herd Update to record the information and automatically calculate the number of contemporaries and ratio values.

Transferring Weights from an Electronic Scale Indicator
Select the External Data tab on the ribbon toolbar, then click the "Weigh Scales" icon. Select your scale's manufacturer, then locate the file on your computer to import birth, weaning, or yearling weights for a group of calves from an electronic scale file. In addition, Measurement Records can be added through this method.

Calculate Measures
Click the "Calc" button to automatically calculate adjusted weights, WDA (Weight per Day of Age), ADG (Avg. Daily Gain), Percent Dam Weight (Weaning), and Frame Score. The question mark buttons to the right of the "Calc" buttons provide a list of fields used in the calculations.

Mature Measurements
Use these fields to record important current measurement information for your bulls. The current weight and BCS (Body Condition Score) are based on the most recent record in the list.

<u>Gain History</u>
Used to record gains information for an animal by date, including body condition score, height, weight, weight per day of age, and average daily gain.

Click the "?" to see the gains measures that are calculated and the requirements to automatically calculate these values.

<u>Gains Test</u>
Gains Test Measurements
Click "Calc Gains Measures" to record the measures for all of the bulls listed with the test.

Start Measures: Calculates WDA (Weight per Day of Age) based on start date and weight.

Mid Measures: Calculates WDA and ADG (Average Daily Gain) based on the mid date and weight. In addition, the ratios will be calculated as compared to all of the bulls' mid ADG and WDA values listed with the test.

End Measures: Calculates WDA and ADG based on the ending date and weight. In addition, the ratios will be calculated as compared to all of the bulls' ending ADG and WDA values listed with the test.

Test Information
Where you record the test name and any comments.

<u>Carcass</u>
Actual/Kill Data
Enter the animal's carcass records you receive from your packer. The right side of the screen lists additional carcass records. All values must be numerical except for Maturity and Quality Grade.

Ultrasound Data
Enter the animal's carcass records determined from an ultrasound test. The right side of the screen has fields to record ultrasound date and technician. All values must be numerical expect for date and technician.

Click "Calc. Carcass Measures" to automatically calculate selected carcass measures.

EPDs

General and Carcass EPDs
Record the EPD measure and accuracy for the value.

My EPDs
Record EPD measures and accuracy for EPDs specific to your breed or record keeping. Click the "Customize My EPD" button to rename the custom EPD labels.

Calculate Interim EPDs
Click the "Calculate' button to determine and record interim EPDs for calves. The sire and dam of each calf must all be the same breed and have values recorded for each EPD to be calculated.

Semen Inventory

Semen inventory records include tank location, current inventory, and purchase or collection information. Semen sales information can also be recorded. Only bulls designated as "Is AI Bull" (on their General tab) will have a Semen tab and be listed in the AI Bulls list.

Add New
To add a semen record, first go to the "Semen" icon under the Home tab in the ribbon toolbar. You will need to add your semen tanks here. You may choose to add the semen inventory for your AI bulls here as well. Or, you can return to the Semen tab in their individual record. Changes made in either location will be recorded in both places.

Click “Edit” to change any values on the record. Click “Delete” to permanently delete an entry.

- *Col Code:* The collection code for the unit.
- *Units*: The current number of units in inventory.
- *Sex* : The sex of the semen, if known.
- *Is Purchased:* Indicates whether the semen was purchased or collected.
- *Purchased From:* The collector or seller's name. If the name is not in the list, you will be prompted to add the person to the Contacts area.
- *Price Per Unit:* Purchase/collection cost per unit of semen.
- *Comment:* Comment about semen or transaction, if needed.
- *Semen Bank*: Semen stored at a bank will generally only have a code, given to you by the bank.
- *Semen Sales:* Enter the sales information here (date, price, # of units sold, sold to, and comments).

Pictures

Pictures are available in both the Registered and Commercial Editions. Pictures can be displayed with the cattle records and on some reports.

***NOTE:** You can only link to a cattle picture on your computer. You cannot link to a picture that is located on temporary media such as a flash drive or CD-ROM. You will need to copy the pictures from these sources onto your computer and then link to them in the software.*

Add a Picture

1. Click on the Picture tab in the individual animal records.
2. Click on "This Animal", then double-click the "Add New" button.
3. Enter details about the picture, including date, comment, and category. Use the category to group similar pictures. For example, you can name one picture "6 Months" and another "1 Year".
4. Click the open folder button to locate the picture on your computer.
5. Click "Save and Close" or "Save and New" to save the picture.

Use as Primary Picture:

This option enables you to choose which picture to display with the record and on reports for each animal.

Sire and Dam

This tab will display the pictures of the animal's sire and dam if they are linked to those animal records in CattleMax CS.

Offspring

This tab will display a list of the bull's offspring and pictures of the offspring if they are linked to those animal records in CattleMax CS.

Pedigree

The Pedigree functionality is available only in the Registered Edition, for you to view the lineage/generational information for each animal. Click "Edit Pedigree" to record additional linage to the selected animals record.

Edit Record

Change the details of the record (ie. name, registration number)

View Record

View a summary of the details, including Measurements and EPDs.

View Pedigree

View the 3- or 5-generation pedigree of the animal.

View Siblings (Maternal)

View a list of cattle with the same dam as the selected animal.

View Siblings (Paternal)

View a list of cattle with the same sire as the selected animal.

View Offspring
View a list of cattle the bull has sired or the cow has calved, depending on which animal records you are in.

View Extended Offspring
See a list of cattle (and their generation level) that share some of the same genetics as the selected animal.

Printing Pedigree Reports
Click the "3-Generation Pedigree" or "5-Generation Pedigree" link to display the animal's lineage in report form, which can be easily printed, emailed or uploaded to a website.

Editing 4th and 5th Generation Pedigrees
Select the animal in the 3rd or 4th generation to add the 4th and/or 5th generations.

Notes
The Notes section provides a place to add any individual notes or comments on a certain animal. This section is very flexible and completely customizable, enabling you to have a journal for each animal.

Use the "Cattle Notes" option in Herd Update to record the same note for a group of cattle.

Financial
The Income and Expenses log enables you to record expenses and income for your cattle operation or for your ranch. You can link each entry to an individual animal.

Adding new income or expense entries
Click "Add New" to record a new entry. Click "Delete" to remove the selected entry. Click "Edit" to make changes to the selected entry.

Reporting
You can create reports that list all of the income and expense entries you have recorded, or choose to narrow the report to only list certain entries through the filter options (such as expenses that were included during the current year, items purchased from a certain vendor, etc).

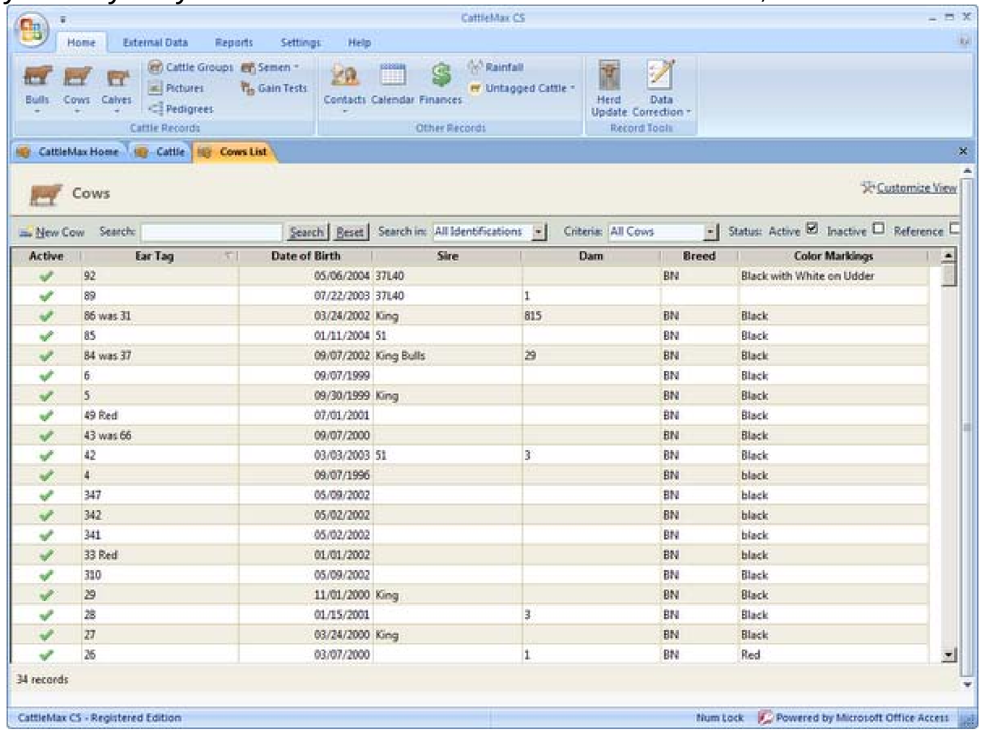
Select the Reports tab in the ribbon toolbar. Click the "Reports" icon button and choose "Expense Report" or "Income Report" from the View Report list. When the report appears, click "Customize Report" in the upper right corner of the report screen to add or remove fields listed as columns on the report. Use the filter option to filter for date ranges, product, category or other fields.

This feature is designed to provide a basic income and expense log. For more in-depth financial analysis, we recommend an accounting program such as QuickBooks.

Show History
This is where you record the show history for an animal. The "Is Show Animal" box must be checked on the General tab in the individual animal record screen for this tab to appear in the records for an animal.

Cows

Cow List
The Cow List displays a list of all of your cows, according to your specifications. For example, you may only want to view cows with an Active status, or those from a certain group.



The Cow's Status, Ear Tag, Date Of Birth, Color Markings, Breed, Sire and Dam are displayed by default. You can add or remove columns to this screen by selecting the "Customize View" link. Double-click an animal in the list to view the detailed invidual records for the cow.

To sort the Cows List by values in a certain column, simply click in the column heading. You may choose to sort them from fields such as "Ear Tag" or "Date of Birth" to list them by age. You will see a small arrow appear on the right side of the heading, showing whether it is sorted in ascending or descending order. Click the heading again to reverse the sort order.

<u>New Cow</u>
Click this button to display the Add a New Cow screen.

<u>Search</u>
Allows you to search the list for a specific animal. When the animal is found in the list, it will be displayed at the top of the screen. This is helpful when you have a long list of cattle and know the specific record you need to view.

Reset
Resets the search criteria and returns you to the first cow in the list.

Search In
Specifies which identification field in the cow's record to look for a match. For example, this might be "ear tag" or "brand"

Criteria
This allows you to display all cows or select by group or production year.

Status
You can display the cows by status of "Active" (default), "Inactive", or "Reference". You may select one or all three.

Cow Selection Area
The light green area on the left lists the primary ID of the current cow and includes links to record tasks for that animal, and has options for selecting and listing other cows.

Find Cattle
Displays the primary means of identification for the current cow displayed. Enter the primary ID for a certain cow into this field to go directly to their individual record, or locate them in the drop menu.

Cattle to List
By
Select which form of identification you want the cows listed by in the Find Cattle box.

Group
Shortens the list of cows in the Find Cattle box to display only cows from a selected group or production year.

Status
Select which cows you want to appear in the Find Cattle box from the Active, Reference and Inactive options. Select "Active" to display only active cows currently in your herd.

"Reference" will display cows that have never actually been in your herd, but are included in the pedigrees of some of your cattle.

"Inactive" will display cows that were formerly in your herd, but have died, been sold or transferred out.

Record Activities
Add a New Animal
Brings up the Add a New Cow screen.

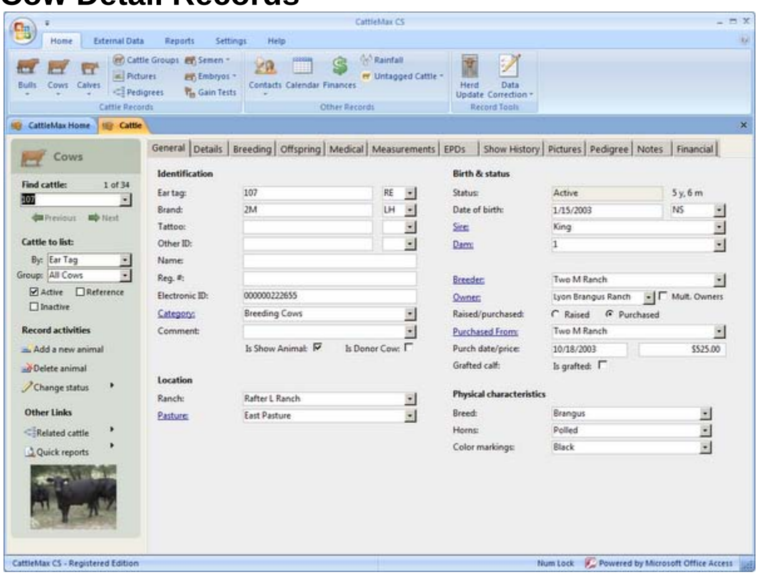
Delete Animal
Use this to delete the current animal (not recommended unless this is a duplicate record). This brings up a warning screen suggesting you change the status to sold, dead, or transferred out rather than deleting the record.

Change Status
Where you change the animal's status in the software, such as sold or dead, without permanently deleting the record.

<u>Other Links</u>
Related Cattle
Quickly shows offspring, extended offspring, maternal and paternal siblings.

Quick Reports
Provides quick links to various combinations of picture and pedigree reports.

Cow Detail Records



The tan record area contains detailed information specific to the cow selected. There are up to 12 tabs for each cow, depending on your edition and options you have enabled in your Preferences.

General
The General tab contains descriptive information about the animal.

<u>Identification</u>
The identification methods and the primary visual ID can be changed in your Preferences (Settings>Preferences>Preferences).

Enter the identification of the animal, which can include text, numbers and/or characters. The boxes to the right of ear tag, brand, tattoo, and other ID are to record the location of the identification.

Is Show Animal
This box must be checked in order for the Show History tab to appear in this cow's record.

Is Donor Cow
This box must be checked in order for the Embryos tab to appear in this cow's record, and to add any embryos to your general inventory with this cow as the genetic donor.

<u>Location</u>
If the cow is currently located on your ranch, you will see the Ranch and Pasture boxes to select a new location.

If the cow is not located on your ranch, type in the location (such as a breeding center). You will be prompted to add the location to the contact list if it is not already recorded there.

If you have "Enable Pasture and Category Histories" enabled in your Preferences, CattleMax will automatically keep a log of movements (such as on 7-15-2008 cow 1 was moved from Main Ranch Front Pasture to Lease Place Hay Meadow.) Click the "Pasture" link to quickly view the individual animal's movement history. An entry will be recorded when the pasture is changed on the General screen or through Herd Update.

<u>Birth & Status</u>
Status
Records the current status of the animal (Active, Sold, Dead, Reference). Location information will appear for active cattle, and disposition information will appear for dead or sold cattle. Click the "Change Status" link on the left side of the screen to change this information.

Date of Birt
Enter the animal's date of birth. If you are estimating the animal's age, you can put the month and day as January 1. For example, if you estimate that an animal is 6 years but are not sure of the exact date of birth, enter January 1 and the estimated year. The current age of the animal is automatically calculated to the corresponding date of birth.

Birth Method
Select the birth method of the animal (Natural Service, Artificial Insemination or Embryo Transfer). If the birth method is selected as embryo transfer, a donor dam box will appear below the birth method box. Select the donor dam of the animal. If the dam is new to the list, you will be prompted to add the cow's record.

Sire/Dam
Choose the sire/dam of the animal, or type in a new entry to add to the list. Click the Sire/Dam links to view general information about the animal. Placing the cursor over the word "Sire" or "Dam" will display the sire or dam's picture if you have added pictures to their individual records.

Breeder
Select the breeder of the animal or type in a new entry to add to the list. The breeder is usually the owner of the dam at the time of calf conception, which may be your ranch if you raised your own replacement heifer.

Owner
The owner is the person or ranch who currently owns the animal. In most cases, this will be your ranch.

Mult. Owners
Check this box if your bull has multiple owners. Click "View Owners" to enter the multiple ownership information. This feature is in the Registered Edition only.

Raised or Purchased
Choose whether the animal was raised or purchased. If the animal was purchased, the "Purchased From" and "Purchase Price" fields will appear. If the animal is raised, and you have the Registered Edition, you will only see the "Asking Price" field.

Grafted Calf
If a calf is being raised by a cow other than the calf's natural mother, check this box. A Genetic/Donor Dam box will appear below the Dam to indicate the cow that gave birth to the calf. The Dam box is to indicate the cow that is currently raising the calf.

Physical Characteristics
Breed
Select the breed of the animal or type in a new entry to add to your Breeds List. You may select which breeds to display from "My Breeds" in your Preferences.

Horns
Indicate the horn status of the animal: "Dehorned", "Horns", "Polled" or "Scurs".

Color Markings
Use the color markings area to give a physical description of the animal.

Disposition Information
Sales Information
The sales information displayed is based on the record entered in the Cattle Sales area. The sales information can only be viewed here, not changed. If you see an error, go to "Sales and Removals" from the CattleMax Home screen to make a correction.

Death/Transfer Information
Enter the date the animal died ("Date Removed From Herd"), the cause of death ("Cause of Removal"). If the reason is unknown, enter "Unknown". Click the "Change Status" link on the left side of the screen to record an animal sale, death or transfer out of the herd, or to correct a status.

Details
The Details tab contains specific characteristics of the animal.

Breed Composition
Indicate the cow's breed and percentage composition of each breed for commercial crossbred cows. To enter a new breed or composition breed not included in the drop menu list, add the breed to your Breeds List (accessible from the Settings tab in the ribbon toolbar).

CattleMax can automatically determine a calf's breed composition based on the sire and dam, as long as they have correct breed composition entered on their Details tab. Ensure the "Automatically Calculate Breed Compositions" feature is enabled in your Preferences for this to work. (Click the Settings tab in the ribbon toolbar, then click the "Preferences" icon. Under the Preferences tab, make sure the box is checked next to "Automatically Calculate Breed Compositions".)

Breed Association Codes
These are only displayed if "Enable Management and Association Codes" is selected in your Preferences.
This field contains boxes to record various codes specific to breed associations. The codes are based on the breed of cattle and the association you have chosen.

Marketing
Includes fields for Asking Price and Marketing Comments, which are displayed on the Sales Catalog (only in the Registered Edition).

Custom Fields
Custom fields are fields you can customize to meet your ranch's specific record keeping needs. To change the label of the box, click on "Customize Custom Fields". You will have ten alphabetic and ten numeric fields to customize. For example, many producers who are using DNA or GeneStar testing use the custom fields to record this data.

Breeding
Pregnancy Details
This section includes the current palpation information for this cow, or may include historical palpations if you are using Production Years.

You can update palpation/pregnancy status for a group of cows with Herd Update (in the Record Tools section of the Home tab in the ribbon toolbar), or individually from this screen.

The "Date Bred" and "Months Bred" values will automatically update depending on the current date. For example, if a palpation date of 9-1-2008 is added with months bred of 5, CattleMax will automatically update the months bred entry to 6 months on 10-1-2008, 7 months on 11-1-2008, etc., so the cow's current months bred status is displayed in the records and on reports. When you click "Add New", the following fields are availble to record the pregnancy details:

Pregnancy Status
Select the pregnancy status from the drop down menu. Choices are: "Not Exposed", "Exposed", "Palpated Bred", "Palpated Open".

Breeding Method
Select the breeding method from the drop down menu. Choices are: "Natural Service", "Artificial Insemination", "Embryo Transplant".

Bred To
Select the bull from the drop down menu.

Palpation Date
Enter the date the cow was palpated.

Date Bred
This date will be entered or calculated from the "Months Bred" field or "Expected Due Date". If a breeding record was entered for the cow before the palpation, this field will already be completed.

Mos. Bred
The months bred determined by the palpation process. You can change this to "Days Bred" in your Preferences.

Expected Due Date
Entered or calculated from the "Date Bred" or "Months Bred".

<u>Breeding Details</u>
Breeding History
To add a new breeding record, click "Add New". Click "Edit" to make changes to a selected record. To remove a record, click "Delete".

This list will contain any breeding record you enter for this cow to provide complete historical breeding information.

Add a Natural Service Breeding Record
To quickly add natural service records for a pasture of cows exposed to a bull, use Herd Update (accessible from the Home tab in the ribbon toolbar or from the CattleMax Home screen under the "Breeding" icon).

In Herd Update:
1. Choose Bulls as the record type, then select the option to "Turn In Bull".
2. Select the bull you are breeding the cows with.
3. Select the ranch and pasture location the cows you are breeding are located in, and their records will automatically be updated to show "Exposed" to the bull you choose. To record an ending exposure record, follow the same process, but choose "Pull Bulls" as the Herd Update task.

Or, you may choose to enter these breeding records individually from each cow's Breeding tab.

Add an AI Breeding Record
Click "Add New", and select "Artificial Insemination" as the Breeding Type.

Add an ET Breeding Record
Click "Add New", and select "Embryo Transfer" as the Breeding Type.

Offspring
This is a list of all calves entered into the software with this cow marked as dam. Calves are automatically added to this list when they are entered in the software, as long as the dam is selected. Each of the offspring also has its own record in CattleMax, and is listed under the Offspring tab for their respective sire.

Click the "Add New" link to record a new offspring. Click the "Customize View" link to select the fields displayed as columns on your screen.

Medical

The medical treatment screen contains all recorded medical procedures that have been performed on the animal. This information can be entered here for a single animal or through Herd Update for a group of cattle. Additional columns may be added to the detail lined by clicking the "Customize View" link and selecting the additional fields you want to appear as columns on your screen.

OCV

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The OCV Tattoo

This field contains the OCV tattoo number.

The OCV #

This field contains the OCV ear tag number.

Medical Records

To add a new medical record, click "Add New". Click "Edit" to modify a selected record. To remove a record, click "Delete".

Category

This is to group similar medical treatments. Example categories include "Birth Vaccs" and "Reproductive".

Medication

New medications entered here will be added to the list for future reference. Once they are added, you will be able to select them from a drop menu, rather than typing the name in again.

Withdrawal/Booster Date

Record these dates if applicable. Animals that fall within a Withdrawal Date will have a **red** warning appear on the General Tab when the animal is viewed, to avoid any mistaken sales.

Route/Location

Choose the description that best fits the given treatment. Click the question mark button to view a diagram of the location options.

Cost

The per head cost for the treatment.

Measurements

The Measurements screen includes weights, contemporaries, carcass data, and gains test. The Herd Update feature can be used to record birth, weaning and yearling records.

Performance Measurements

The Calf Measurements screen will already be complete for cows you raised and entered the calf information for in CattleMax. It will remain in their record when they are promoted to a cow. Instructions for entering those records are included below:

Contemporaries and Ratios

Use Herd Update to record the information and automatically calculate the number of contemporaries and ratio values.

Transferring Weights from an Electronic Scale Indicator

Select the External Data tab on the ribbon toolbar, then click the "Weigh Scales" icon. Select your scale's manufacturer, then locate the file on your computer to import birth, weaning, or yearling weights for a group of cows from an electronic scale file. In addition, Measurement Records can be added through this method.

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Mature Measurements

Use these fields to record important current measurement information for your cows. The current weight and BCS (Body Condition Score) are based on the most recent record in the list.

Gain History

Used to record gains information for an animal by date, including body condition score, height, weight, weight per day of age, and average daily gain.

Click the "?" to see the gains measures that are calculated and the requirements to automatically calculate these values.

Gains Test

Gains Test Measurements

Click "Calc Gains Measures" to record the measures for all of the cows listed with the test.

Start Measures: Calculates WDA (Weight per Day of Age) based on start date and weight.

Mid Measures: Calculates WDA and ADG (Average Daily Gain) based on the mid date and weight. In addition, the ratios will be calculated as compared to all of the cows' mid ADG and WDA values listed with the test.

End Measures: Calculates WDA and ADG based on the ending date and weight. In addition, the ratios will be calculated as compared to all of the cows' ending ADG and WDA values listed with the test.

Test Information

Where you record the test name and any comments.

Carcass

Actual/Kill Data

Enter the animal's carcass records you receive from your packer. The right side of the screen lists additional carcass records. All values must be numerical except for Maturity and Quality Grade.

Ultrasound Data

Enter the animal's carcass records determined from an ultrasound test. The right side of the screen has fields to record ultrasound date and technician. All values must be numerical expect for date and technician.

Click "Calc. Carcass Measures" to automatically calculate selected carcass measures.

EPD's

General and Carcass EPDs

Record the EPD measure and accuracy for the value.

My EPDs

Record EPD measures and accuracy for EPDs specific to your breed or record keeping. Click the "Customize My EPD" button to rename the custom EPD labels.

Calculate Interim EPDs

Click the "Calculate' button to determine and record interim EPDs for calves. The sire and dam of each calf must all be the same breed and have values recorded for each EPD to be calculated.

Show History

This is where you record the show history for an animal. The "Is Show Animal" box must be checked on the General tab in the individual animal record screen for this tab to appear in the records for an animal.

Pictures

Pictures are available in both the Registered and Commercial Editions. Pictures can be displayed with the cattle records and on some reports.

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2. Click on "This Animal", then double-click the "Add New" button.
3. Enter details about the picture, including date, comment, and category. Use the category to group similar pictures. For example, you can name one picture "6 Months" and another "1 Year".
4. Click the open folder button to locate the picture on your computer.
5. Click "Save and Close" or "Save and New" to save the picture.

Use as Primary Picture
This option enables you to choose which picture to display with the record and on reports for each animal.

Sire and Dam
This tab will display the pictures of the animal's sire and dam if they are linked to those animal records in CattleMax CS.

Offspring
This tab will display a list of the cow's offspring and pictures of the offspring if they are linked to those animal records in CattleMax CS.

Pedigree
The Pedigree functionality is available only in the Registered Edition, for you to view the lineage/generational information for each animal. Click "Edit Pedigree" to record additional linage to the selected animal's record.

Edit Record
Change the details of the record (ie. name, registration number)

View Record
View a summary of the details, including Measurements and EPDs.

View Pedigree
View the 3- or 5-generation pedigree of the animal.

View Siblings (Maternal)
View a list of cattle with the same dam as the selected animal.

View Siblings (Paternal)
View a list of cattle with the same sire as the selected animal.

View Offspring
View a list of cattle the bull has sired or the cow has calved, depending on which animal records you are in.

View Extended Offspring
See a list of cattle (and their generation level) that share some of the same genetics as the selected animal.

Printing Pedigree Reports
Click the "3-Generation Pedigree" or "5-Generation Pedigree" link to display the animal's lineage in report form, which can be easily printed, emailed or uploaded to a website.

Editing 4th and 5th Generation Pedigrees
Select the animal in the 3rd or 4th generation to add the 4th and/or 5th generations.

Notes
The Notes section provides a place to add any individual notes or comments on a certain animal. This section is very flexible and completely customizable, enabling you to have a journal for each animal.

Use the "Cattle Notes" option in Herd Update to record the same note for a group of cattle.

Financial
The Income and Expenses log enables you to record expenses and income for your cattle operation or for your ranch. You can link each entry to an individual animal.
Add a new income or expense entry
Click "Add New" to record a new entry. Click "Delete" to remove the selected entry. Click "Edit" to make changes to the selected entry.

Reporting
You can create reports that list all of the income and expense entries you have recorded, or choose to narrow the report to only list certain entries through the filter options (such as expenses that were included during the current year, items purchased from a certain vendor, etc).

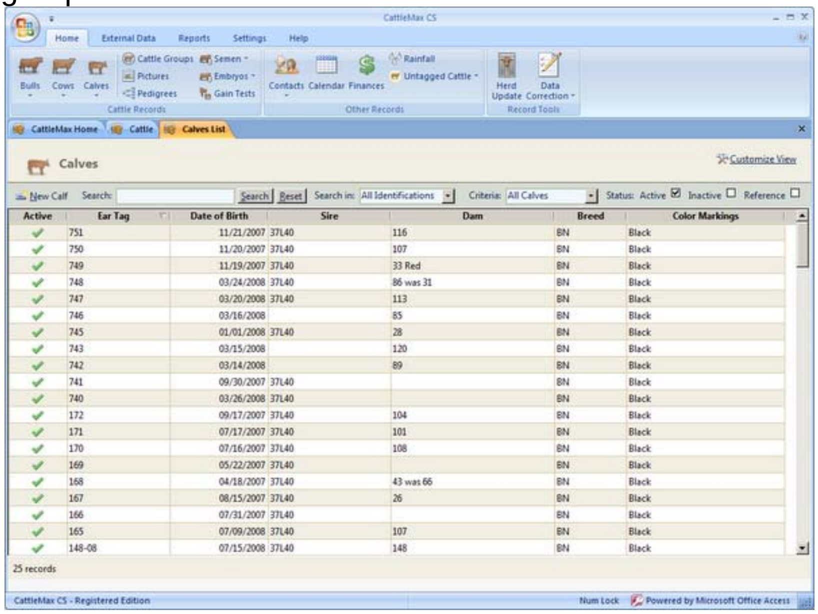
Select the Reports tab in the ribbon toolbar. Click the "Reports" icon button and choose "Expense Report" or "Income Report" from the View Report list. When the report appears, click "Customize Report" in the upper right corner of the report screen to add or remove fields listed as columns on the report. Use the filter option to filter for date ranges, product, category or other fields.

This feature is designed to provide a basic income and expense log. For more in-depth financial analysis, we recommend an accounting program such as QuickBooks.

Calves

Calf List

The Calves List displays a list of all of your calves, according to your specifications. For example, you may only want to view calves with an Active status, or those from a certain group.



The Calf's Status, Ear Tag, Date Of Birth, Color Markings, Breed, Sire and Dam are displayed by default. You can add or remove columns to this screen by selecting the "Customize View" link. Double-click an animal in the list to view the detailed invidual records for the calf.

To sort the Calves List by values in a certain column, simply click in the column heading. You may choose to sort them from fields such as "Ear Tag" or "Date of Birth" to list them by age. You will see a small arrow appear on the right side of the heading, showing whether it is sorted in ascending or descending order. Click the heading again to reverse the sort order.

<u>New Calf</u>
Click this button to display the Add a New Calf screen.

<u>Search</u>
Allows you to search the list for a specific animal. When the animal is found in the list, it will be displayed at the top of the screen. This is helpful when you have a long list of cattle and know the specific record you need to view.

<u>Reset</u>
Resets the search criteria and returns you to the first calf in the list.

<u>Search In</u>
Specifies which identification field in the calf's record to look for a match. For example, this might be "ear tag" or "brand"

<u>Criteria</u>
This allows you to display all calves or select by group or production year.

Status
You can display the calves by status of "Active" (default), "Inactive", or "Reference". You may select one or all three.

Calves Selection Area
The light green area on the left lists the primary ID of the current calf and includes links to record tasks for that animal, and has options for selecting and listing other calves.

Find Cattle
Displays the primary means of identification for the current calf displayed. Enter the primary ID for a certain calf into this field to go directly to their individual record, or locate them in the drop menu.

Cattle to List
By
Select which form of identification you want the calves listed by in the Find Cattle box.

Group
Shortens the list of calves in the Find Cattle box to display only calves from a selected group or production year.

Status
Select which calves you want to appear in the Find Cattle box from the Active, Reference, Replacements and Inactive options. Select "Active" to display only active calves currently in your herd.

"Reference" will display calves that have never actually been in your herd, but are included in the offspring list of some of your cattle.

"Inactive" will display calves that were formerly in your herd, but have died, been sold or transferred out.

"Replacements" will display calves that have promoted to the "Replacement Heifer" or "Developing Bull" status.

Record Activities
Add a New Animal
Brings up the Add a New Bull screen.

Delete Animal
Use this to delete the current animal (not recommended unless this is a duplicate record). This brings up a warning screen suggesting you change the status to sold, dead, or transferred out rather than deleting the record.

Change Status
Record the change of status for a calf, such as sold or dead, without permanently deleting its record.

Other Links

Related Cattle

Quickly shows maternal and paternal siblings.

Quick Reports

Provides quick links to various combinations of picture and pedigree reports.

Calf Detailed Record Area

The gray record area contains detailed information specific to the calf selected. There are up to nine tabs for each cow, depending on your edition.

General

The General tab contains descriptive information about the animal.

Identification

The identification methods and the primary visual ID can be changed in your Preferences (Settings>Preferences>Preferences).
Enter the identification of the animal, which can include text, numbers and/or characters. The boxes to the right of ear tag, brand, tattoo, and other ID are to record the location of the identification.

Is Show Animal

This box must be checked in order for the Show History tab to appear in this calf's record.

Location

If the calf is currently located on your ranch, you will see the Ranch and Pasture boxes to select a new location.

If the calf is not located on your ranch, type in the location (such as a backgrounder). You will be prompted to add the location to the contact list if it is not already recorded there.

If you have "Enable Pasture and Category Histories" enabled in your Preferences, CattleMax will automatically keep a log of movements (such as on 7-15-2008 calf 101 was moved from Main Ranch Front Pasture to Lease Place Hay Meadow.) Click the "Pasture" link to quickly view the individual animal's movement history. An entry will be recorded when the pasture is changed on the General screen or through Herd Update.

Birth & Status

Status

Records the current status of the animal (Active, Sold, Dead, Reference). Location information will appear for active cattle, and disposition information will appear for dead or sold cattle. Click the "Change Status" link on the left side of the screen to change this information.

Date of Birth

Enter the animal's date of birth. You may enter an estimated date of birth. The current age of the animal is automatically calculated to the corresponding date of birth.

Birth Method
Select the birth method of the animal (Natural Service, Artificial Insemination or Embryo Transfer). If the birth method is selected as embryo transfer, a donor dam box will appear below the birth method box. Select the donor dam of the animal. If the dam is new to the list, you will be prompted to add the cow's record.

Sire/Dam
Choose the sire/dam of the animal, or type in a new entry to add to the list. Click the Sire/Dam links to view general information about the animal. Placing the cursor over the word "Sire" or "Dam" will display the sire or dam's picture if you have added pictures to their individual records.

Breeder
Select the breeder of the animal or type in a new entry to add to the list. The breeder is usually the owner of the dam at the time of calf conception, which may be your ranch.

Owner
The owner is the person or ranch who currently owns the animal. In most cases, this will be your ranch.

Mult. Owners
Check this box if your calf has multiple owners. Click "View Owners" to enter the multiple ownership information. This feature is in the Registered Edition only.

Raised Or Purchased
Choose whether the animal was raised or purchased. If the animal was purchased the "Purchased From" and the "Purchase Price" fields will be displayed. If the animal is raised and you have the Registered Edition you will only see the "Asking Price" field.

Grafted Calf
If a calf is being raised by a cow other than the calf's natural mother, check this box. A Genetic/Donor Dam box will appear below the Dam to indicate the cow that gave birth to the calf. The Dam box is to indicate the cow currently raising the calf.

<u>Physical Characteristics</u>
Breed
Select the breed of the animal or type in a new entry to add to your Breeds List. You may select which breeds to display from "My Breeds" in your Preferences.

Horns
Indicate the horn status of the animal: "Dehorned", "Horns", "Polled" or "Scurs".

<u>Disposition Information</u>
Sales Information
The sales information displayed is based on the record entered in the Cattle Sales area. The sales information can only be viewed here, not changed. If you see an error, go to "Sales and Removals" from the CattleMax Home screen to make a correction.

Death/Transfer Information
Enter the date the animal died ("Date Removed From Herd"), the cause of death ("Cause of Removal"). If the reason is unknown, enter "Unknown". Click the "Change Status" link on the left side of the screen to record an animal sale, death or transfer out of the herd, or to correct a status.

Details
The Details tab contains specific characteristics of the animal.

<u>Breed Composition</u>
Indicate the calf's breed and percentage composition of each breed for commercial crossbred calves. To enter a new breed or composition breed not included in the drop menu list, add the breed to your Breeds List (accessible from the Settings tab in the ribbon toolbar).

CattleMax can automatically determine a calf's breed composition based on the sire and dam, as long as they have correct breed composition entered on their Details tab. Ensure the "Automatically Calculate Breed Compositions" feature is enabled in your Preferences for this to work. (Click the Settings tab in the ribbon toolbar, then click the "Preferences" icon. Under the Preferences tab, make sure the box is checked next to "Automatically Calculate Breed Compositions".)

<u>Breed Association Codes</u>
These are only displayed if "Enable Management and Association Codes" is selected in your Preferences.
This field contains boxes to record various codes specific to breed associations. The codes are based on the breed of cattle and the association you have chosen.
<u>Marketing</u>
Includes fields for Asking Price and Marketing Comments, which are displayed on the Sales Catalog (only in the Registered Edition).

<u>Custom Fields</u>
Custom fields are fields you can customize to meet your ranch's specific record keeping needs. To change the label of the box, click on "Customize Custom Fields". You will have ten alphabetic and ten numeric fields to customize. For example, many producers who are using DNA or GeneStar testing use the custom fields to record this data.

Medical
The medical treatment screen contains all recorded medical procedures that have been performed on the animal. This information can be entered here for a single animal or through Herd Update for a group of cattle. Additional columns may be added to the detail lined by clicking the "Customize View" link and selecting the additional fields you want to appear as columns on your screen.

OCV
Stands for Officially Calfhood Vaccinated against Brucellosis.

The OCV Tattoo
This field contains the OCV tattoo number.

The OCV #
This field contains the OCV ear tag number.

Add a Treatment
To add a new medical record, click "Add New". Click "Edit" to modify a selected record. To remove a record, click "Delete".

Category
This is to group similar medical treatments. Example categories include "Birth Vaccs" and "Dewormer".

Medication
New medications entered here will be added to the list for future reference. Once they are added, you will be able to select them from a drop menu, rather than typing the name in again.

Withdrawal/Booster Date
Record these dates if applicable. Animals that fall within a Withdrawal Date will have a **red** warning appear on the General Tab when the animal is viewed, to avoid any mistaken sales.

Route/Location
Choose the description that best fits the given treatment. Click the question mark button to view a diagram of the location options.

Cost
The per head cost for the treatment.

Measurements
The Measurements screen includes weights, contemporaries, carcass data, and gains test. The Herd Update feature can be used to record birth, weaning and yearling records.

Performance
Contemporaries and Ratios
Use Herd Update to record the information and automatically calculate the number of contemporaries and ratio values.

Transferring Weights from an Electronic Scale Indicator
Select the External Data tab on the ribbon toolbar, then click the "Weigh Scales" icon. Select your scale's manufacturer, then locate the file on your computer to import birth, weaning, or yearling weights for a group of calves from an electronic scale file. In addition, Measurement Records can be added through this method.

Calculate Measures
Click the "Calc" button to automatically calculate adjusted weights, WDA (Weight per Day of Age), ADG (Avg. Daily Gain), Percent Dam Weight (Weaning), and Frame Score. The question mark buttons to the right of the "Calc" buttons provide a list of fields used in the calculations.

Mature Measurements
Use these fields to record important current measurement information for your calves. The current weight and BCS (Body Condition Score) are based on the most recent record in the list.

Gain History
Used to record gains information for an animal by date, including body condition score, height, weight, weight per day of age, and average daily gain.

Click the "?" to see the gains measures that are calculated and the requirements to automatically calculate these values.

Gains Test
Click "Calc Gains Measures" to record the measures for all of the calves listed with the test.

Start Measures: Calculates WDA (Weight per Day of Age) based on start date and weight.

Mid Measures: Calculates WDA and ADG (Average Daily Gain) based on the mid date and weight. In addition, the ratios will be calculated as compared to all of the calves' mid ADG and WDA values listed with the test.

End Measures: Calculates WDA and ADG based on the ending date and weight. In addition, the ratios will be calculated as compared to all of the calves' ending ADG and WDA values listed with the test.

Carcass
Actual/Kill Data
Enter the animal's carcass records you receive from your packer. The right side of the screen lists additional carcass records. All values must be numerical except for Maturity and Quality Grade.

Ultrasound Data
Enter the animal's carcass records determined from an ultrasound test. The right side of the screen has fields to record ultrasound date and technician. All values must be numerical expect for date and technician.

Click "Calc. Carcass Measures" to automatically calculate selected carcass measures.

EPD's
General and Carcass EPDs
Record the EPD measure and accuracy for the value.

My EPDs
Record EPD measures and accuracy for EPDs specific to your breed or record keeping. Click the "Customize My EPD" button to rename the custom EPD labels.

Automatically Calculate Interim EPDs
Click the "Calculate' button to determine and record interim EPDs for calves. The sire and dam of each calf must all be the same breed and have values recorded for each EPD to be calculated.

Show History
This is where you record the show history for an animal. The "Is Show Animal" box must be checked on the General tab in the individual animal record screen for this tab to appear in the records for an animal.

Pictures
Pictures are available in both the Registered and Commercial Editions. Pictures can be displayed with the cattle records and on some reports.
NOTE: *You can only link to a cattle picture on your computer. You cannot link to a picture that is located on temporary media such as a flash drive or CD-ROM. You will need to copy the pictures from these sources onto your computer and then link to them in the software.*

Add a Picture

1. Click on the Picture tab in the individual animal records.
2. Click on "This Animal", then double-click the "Add New" button.
3. Enter details about the picture, including date, comment, and category. Use the category to group similar pictures. For example, you can name one picture "6 Months" and another "1 Year".
4. Click the open folder button to locate the picture on your computer.
5. Click "Save and Close" or "Save and New" to save the picture.

Use as Primary Picture
This option enables you to choose which picture to display with the record and on reports for each animal.

Sire and Dam
This tab will display the pictures of the animal's sire and dam if they are linked to those animal records in CattleMax CS.

Pedigree
The Pedigree functionality is available only in the Registered Edition, for you to view the lineage/generational information for each animal. Click "Edit Pedigree" to record additional linage to the selected animals record. If you have already entered pedigree information for a calf's sire and dam, it will automatically appear on the calf's pedigree.

Edit Record
Change the details of the record (ie. name, registration number)

View Record
View a summary of the details, including Measurements and EPDs.

View Pedigree
View the 3- or 5-generation pedigree of the animal.

View Siblings (Maternal)
View a list of cattle with the same dam as the selected animal.

View Siblings (Paternal)
View a list of cattle with the same sire as the selected animal.

Notes
The Notes section provides a place to add any individual notes or comments on a certain animal. This section is very flexible and completely customizable, enabling you to have a journal for each animal.

Use the "Cattle Notes" option in Herd Update to record the same note for a group of cattle.

Financial
The Income and Expenses log enables you to record expenses and income for your cattle operation or for your ranch. You can link each entry to an individual animal.

Add a new income or expense entry
Click "Add New" to record a new entry. Click "Delete" to remove the selected entry. Click "Edit" to make changes to the selected entry.

Reporting
You can create reports that list all of the income and expense entries you have recorded, or choose to narrow the report to only list certain entries through the filter options (such as expenses that were included during the current year, items purchased from a certain vendor, etc).

Select the Reports tab in the ribbon toolbar. Click the "Reports" icon button and choose "Expense Report" or "Income Report" from the View Report list. When the report appears, click "Customize Report" in the upper right corner of the report screen to add or remove fields listed as columns on the report. Use the filter option to filter for date ranges, product, category or other fields.

This feature is designed to provide a basic income and expense log. For more in-depth financial analysis, we recommend an accounting program such as QuickBooks.

Cattle Groups

The Cattle Groups feature enables you to group similar records together for navigation and reporting. For example, you want to create a group for your "2008 Hereford Heifers". By creating a group with that name and designating cattle in that group, you can easily create reports that only list the cattle within that group.

To access the Cattle Groups feature to designate your groups, click the "Cattle Groups" icon in the Cattle Records section of the Home tab in your ribbon toolbar. Or, click the "Management" icon in your CattleMax Home screen, and select "Manage cattle groups".

Working with the Groups
Click "Add New Group" under Record Activities to create a new group. Click "Delete Group" to remove a group from the list. This will only remove the group name - the cattle records will not be deleted from the software.

Adding Cattle to a Group
Click "Add/edit cattle in group" under Cattle Groups Tools to add or remove cattle from the selected group. A cattle selection screen will appear where can select the cattle to add from a list.

Check all types of cattle you want to appear in your selection list at the top of the Edit Cattle Group screen, then select the cattle to add to the new group. Click "Add" between the boxes to move the cattle to the new group.

Embryos

Embryo inventory and breeding records are available in the Registered Edition only. The option to "Enable Embryo Transfer (ET)" must be checked in your Preferences for this feature to work.

To access the embryo records, click the "Embryos" icon in the Cattle Records section the Home tab of your ribbon toolbar. You will have options to "View Donor Cows" or "View Embryo Tanks".

Embryo inventories for individual donor cows will also be kept under the Embryos tab in their detailed individual animal record.

View Donor Cows
This icon displays inventory and flush history information relevant to the individual donor cows. It is similar to the records under their Embryos tabs in the detailed animal records. The "Is Donor Cow" box on the General tab for each cow must be checked in order for her to appear in this section.

This contains information about the embryos in your inventory with the selected cow as the genetic donor. This screen provides the option to add a single embryo or multiple embryos. It is the only screen in the embryo records where you can add multiple embryos at once.

<u>Find Donor Cow</u>
Any cows you have marked as "Is Donor Cow" in their individual records will appear in this list. Simply select the cow you want to work with.

<u>Embryos Tab</u>
Add a Single Embryo
Click "Add New" to add a single embryo to this cow's inventory.

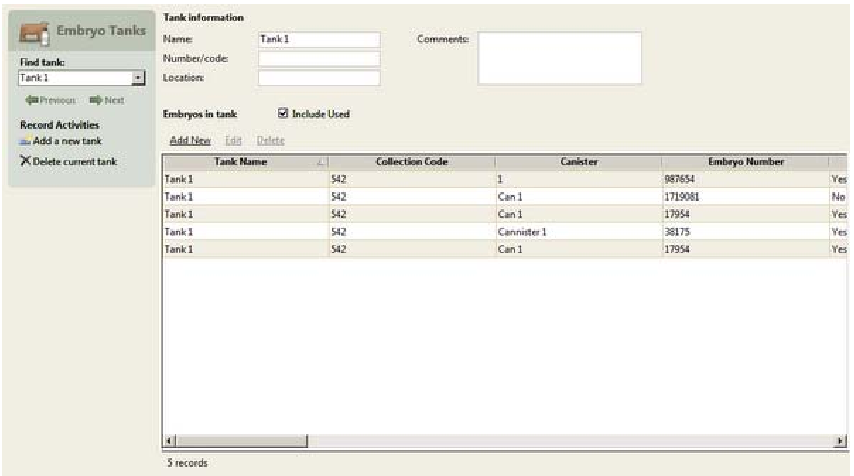
Add Multiple Embryos
Click "Add Multiple Embryos" to add more than one embryo to this cow's inventory. Embryos added with this option must be from the same flush.

You can change the columns displayed on this screen by clicking "Customize View" in the top right of the screen.

<u>Flush History Tab</u>
Flush History
Record the cow's flush history here. Click "Add New" to enter information on a flush, "Edit" to change information in a selected record and "Delete" to remove a selected record.

View Embryo Tanks

The Embryo Tanks screen provides an overview of your embryo inventory for all donor cows. This information is linked to the embryo inventory records for individual donor cows, located under the Embryos tab in their detailed animal record. Embryo records are only available in the Registered Edition, and must be enabled in your Preferences.



ET Records

Click the "Add New" link to add new embryos to your inventory. Click "Edit" to modify a selected record. Click "Remove" to remove a selected record.

General Information

Dam

The dam (genetic donor) of the embryo.

Sire

The sire of the embryo.

Asking $/Unit

The price per unit you would receive for selling the embryo.

Location Information

Record the physical location (storage site) and details for each embryo.

Is Used

If this embryo is selected as one used in an ET breeding record, this box will automatically be checked. You can also check this box yourself if the embryo is used but was not linked with a certain breeding record.

Sales Information

Record sales information if you sell embryos from your inventory.

Semen

The semen inventory and artificial insemination (AI) breeding records are available in both the Registered and Commercial Edition. The "Enable Real Time Semen Inventory" option box must be checked in your Preferences in order for CattleMax to automatically deduct semen units from your inventory as they are used in a breeding.

The semen records are accessed from the "Semen" icon in the Cattle Records section of the Home tab in your ribbon toolbar. There are options to "View AI Bulls" and "View Semen Tanks". The inventory records are also linked to the individual bull records marked "Is AI Bull" on their General tab in the detailed animal records. These are accessed under the Semen tab for these bulls in their detailed animal record.

View AI Bulls
This information shows the Semen inventory for AI Bulls. It is linked to the Semen Inventory records and tanks under the "View Semen Tanks" option, and under the Semen tab in each AI bull's detailed animal record. Bulls must have "Is AI Bull" checked on their General tab in order for them to appear in this section.

<u>Find AI Bull</u>
Only bulls marked "Is AI Bull" will appear in this list. Simply select the bull you want to work with.

<u>Semen Tab</u>
Click "Add New" to add a new semen inventory record for the selected AI bull. Click "Edit" to modify the selected record. Click "Remove" to delete the selected semen inventory record.

When you click "Add New" you will have fields for the following information:

General Information

- Current Inventory: The number of units currently on hand.
- Sex: The sex of the semen (Bull, Heifer, Unknown).
- Asking $/Unit: The price per unit if the semen were sold.
- Location: The physical location of the semen: "On Site" or "Semen Bank".
- Tank: The identification of the tank where the semen is stored.
- Canister: The identification of the canister where the semen is stored.
- Coll Code: The collection code for the semen.
- Comment: Enter comment if desired.

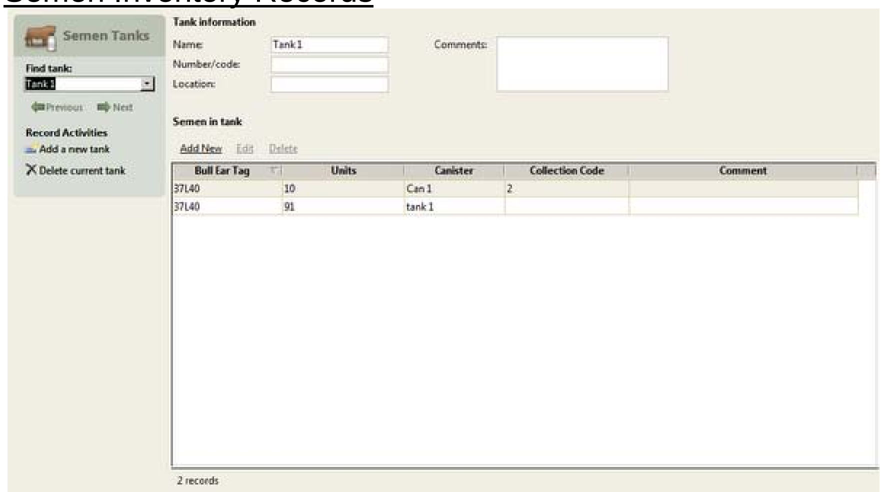
Purchase/Collection Details

- Pur/Col Date: The date the semen was collected or purchased.
- Pur/Col/Cost per unit: The cost of the semen.
- Initial Inventory: The beginnning inventory.
- Pur/Col From: The vendor that supplied the semen, if purchased. The service that collected the semen, if collected.

<u>Sales Tab</u>
Click "Add New" to add a new sales record for semen in your inventory for the selected AI bull.

View Semen Tanks
The Semen Tanks screen provides an overview of your total semen inventory from all AI bulls. This information is linked to the individual semen inventory records for each AI bull under the Semen tab in their detailed animal record, or by choosing "View AI Bulls" from the "Semen" icon in the Home toolbar.

<u>Semen Inventory Records</u>

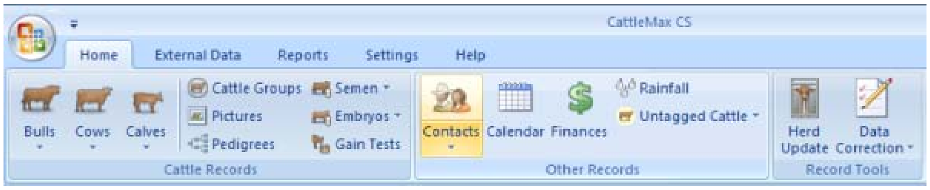


Click "Add New" to add a new semen inventory record. Click "Edit" to modify the selected record. Click "Remove" to delete the selected semen inventory record.

The Add New screen will contain fields for you to record details for each unit of semen in your inventory. You can record as many or few details as you like.

Other Records

Contacts



The Contacts section helps you maintain and manage contact information, transactions and notes for breeders, customers and suppliers.

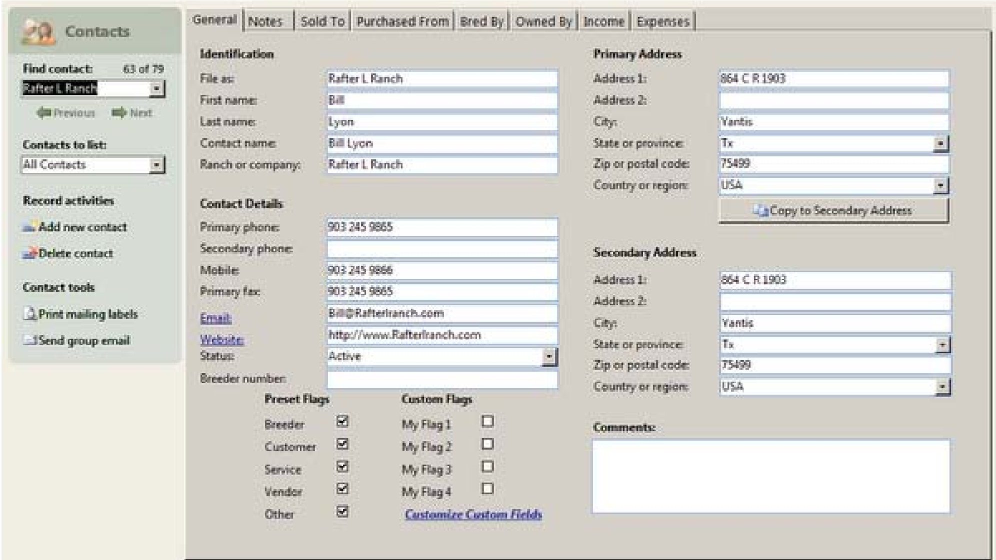
Record Activities
Click "Add New Contact" to add a new contact record. Click "Delete Contact" to remove the selected contact record.

Contact Tools
<u>Print Mailing Labels</u>
Click "Print Mailing Labels" to open the Print Mailing Labels screen. Select the Contacts from the left side of the screen to appear on your labels. If you have a long list of contacts and only want to print labels for contacts in a specific category, you can use the filtering options to narrow your list. Click "Apply Filter" to select your criteria. For example, if you want labels for contacts you have flagged as breeders and located in Texas, type "Is Breeder" in the Information to Filter box, then enter "Primary State" in the second filter box that appears. Select "TX" from the next box that appears on the screen, then click "OK".

Once you have the contacts you need selected, click "Add" to place them in the Contacts to Include on Labels box, then click "OK" to print your labels.

<u>Send Group Email</u>
Send the same E-mail message to all or selected contacts. Once again, you can apply a filter to reduce yoru list.

General



File As

CattleMax uses the "File As" field to determine how to display the contact. This is how the contact will be listed in the Find Contact box. You may choose to list the contacts by first and last name, or by business name.

Email

The contact's Email address. Click the "Email" link to send a message to the contact. When sending group emails, only contacts with email addresses entered here will be displayed for selection.

Status

Set the contact's status here. Choices are Active, Inactive or Reference.

Breed number

Record this information, if known. This is used to help complete the breed registration applications. The breeder number entered here will be displayed in the Membership Number field on the breed registration forms if this contact is selected as the breeder when an animal is added to CattleMax.

Primary Address

This address will be used for the contact when printing reports and mailing labels.

Comments

Record comments about the contact, if needed. This may include the type of cattle they are interested in.

Preset Flags

CattleMax CS helps organize contacts by certain preset categories. For example, only contacts with the Breeder flag checked will appear when you filter for "Is Breeder". When you click "Yes" to the prompt that appears when you enter a new name in the Sold To, Breeder, Purchased From, or Performed By (in the medical treatment records) fields, CattleMax will first check to see if the name appears in the Contacts screen. If so, the appropriate flag will be checked.

Custom Flags

You can create your own contact flags by clicking the "Customize Custom Fields" link here, or by selecting the Settings tab in your ribbon toolbar, clicking the "Preferences" icon, then choosing "Custom Fields". For example, you may want to separate contacts that raise commercial cattle from those that have a registered operation.

Notes

- Click "Customize View" to change the columns displayed on this screen.
- Click "Add New" to add a new note.
- Select a note from the list and click "Edit" to modify a note entry.
- Select a note from the list and click "Delete" to remove the note entry.

Sold To

The Sold To tab records information on cattle sold to the selected contact. For instance, if you selected this contact in the Sold To field on a Sales Ticket, the transaction would be automatically displayed here. You may edit a transaction in this screen, but it cannot be deleted here. To delete the transaction, you must locate the Sales Ticket and remove the animal(s) from the ticket there.

Purchased From

The Purchased From tab records information on cattle you purchase from the selected contact. The transaction may be edited in this screen but not deleted. To delete the transaction, you must locate the Sales Ticket for certain animal(s) and change the selection in the Sold To field, or remove the animal(s) from the Sales Ticket.

Bred By

This tab displays the animal(s) in your herd bred by this contact. This list is automatically updated when you select this contact as "Breeder" on the animal's General tab in their individual record. You may edit an entry by selecting the record and clicking "Edit", and you may remove an entry by selecting the record and changing the "Breeder" field under the Birth & Acquisition heading to another breeder.

Owned By

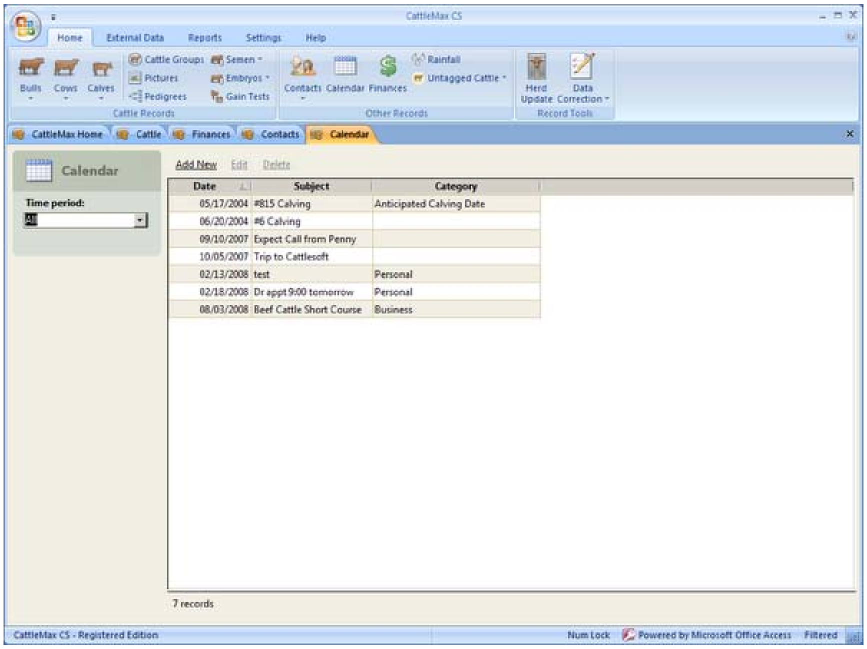
This tab displays the animal(s) in your herd owned by the selected contact. You may edit an entry by selecting the record and clicking "Edit", and you may remove an entry by selecting the record and changing the owner field to another contact or your ranch. Entries on this tab will be automatically updated if the "Owner" field in the General tab of an animal's individual record is changed.

Income

This tab displays income items entered in the Finances section. You may edit or delete the income entry by selecting it, and clicking "Edit" or "Delete" here, or in the Finances section.

Expenses
This tab displays expense items entered in the Finances section with this contact as the vendor. You may edit or delete the income entry by selecting it, and clicking "Edit" or "Delete" here, or in the Finances section.

Calendar



In this screen, you can view and schedule events and appointments, and set task reminders.

Add Event
To add a new event, click "Add New". Enter the task or event name and date.

<u>Subject</u>
This is the subject you have designated for the task/event.

<u>Category</u>
This box is customizable so you can enter categories and use them as needed. When a new category is entered, it will be added to the list for future use.

<u>Completed</u>
If you have completed the task, check this box. The Task Completed list will be updated.

<u>Priority</u>
Select the priority of the event. Choices are High, Average and Low.

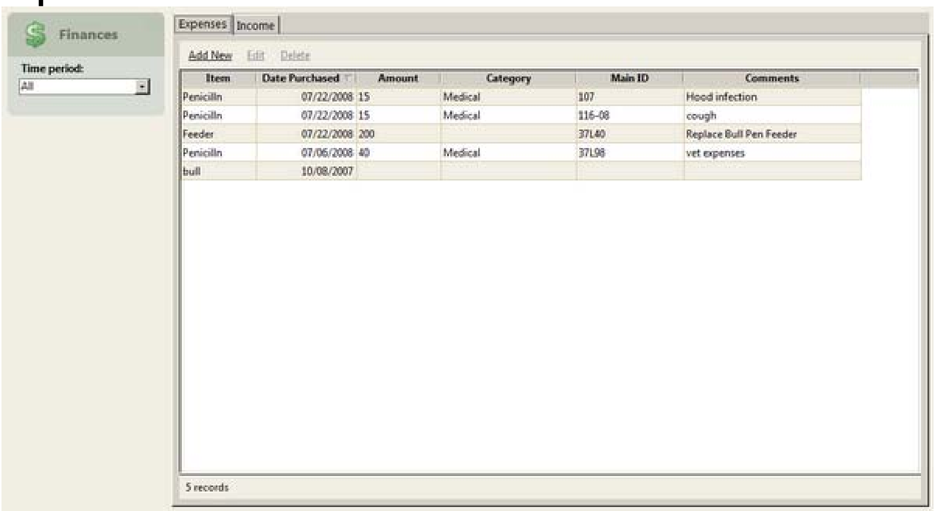
<u>Description</u>
Enter a brief description of the event, or any notes you want to record for the task. To create a report that lists your tasks, go to the Reports section (Reports tab>Reports icon), and select the "Calendar - Tasks and Reminders" report from the list.

Finances

The Finances section keeps a log of income and expenses to record these entries for your ranch. This feature is designed to provide a basic income and expense log that can be categorized and totaled for reports. For more in-depth financial analysis, we recommend an accounting program such as QuickBooks.

You can link income and expenses directly to a contact, or to an individual animal. These records will also appear in the Contacts section and the individual cattle reocrds.

Expenses



<u>Add a new Expense</u>

Click "Add New" to add a new expense item. Click "Delete" to remove the selected entry. Click "Edit" to make changes to the selected entry.

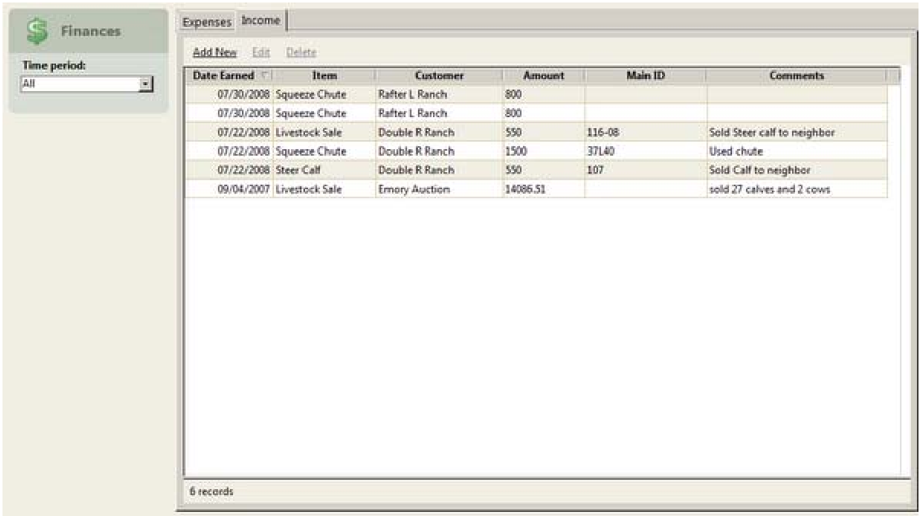
If the "Purchased From" field is completed, the transaction will be recorded under the designated contact's Expense tab. If the "Animal" field is completed, the expense entry will be recorded under their Finances tab in their individual animal record.

<u>Reporting</u>

You can create reports that show all of the income and expenses you have recorded, and you can also choose to have the report narrowed to only list certain entries (such as expenses incurred during the current year, items purchased from a certain vendor, etc).

Select the Reports tab in your ribbon toolbar, then click the "Reports" icon. Select the "Expense Report" from the list. When the report appears, click the "Customize Report" link to add or remove fields from the report or to sort, filter, or group transactions.

Income



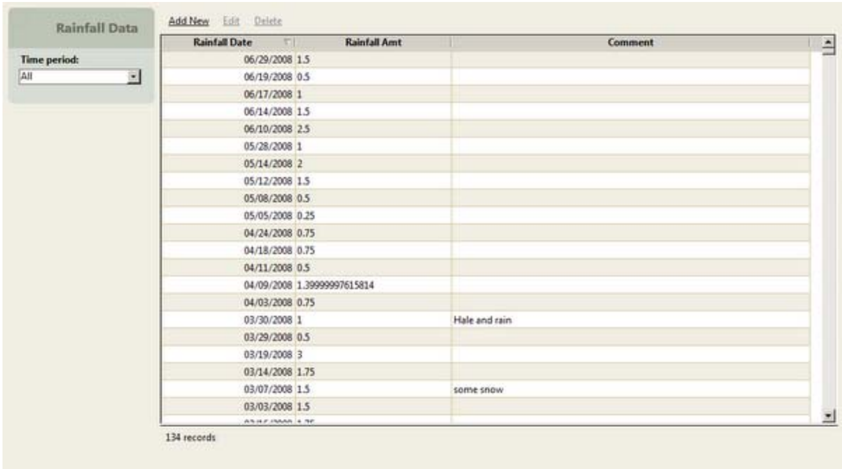
<u>Add new Income</u>
Click "Add New" to add a new income entry. Click "Delete" to remove the selected entry. Click "Edit" to make changes to the selected entry.

If the "Customer" field is completed, the transaction will be recorded under the designated contact's Income tab. If the "Animal" field is completed, the income entry will be recorded under their Finances tab in their individual animal record.

<u>Reporting</u>
You can create reports that show all of the income and expenses you have recorded, and you can also choose to have the report narrowed to only list certain entries (such as income during the current year, items sold to a certain customer, etc).

Select the Reports tab in your ribbon toolbar, then click the "Reports" icon. Select the "Income Report" from the list. When the report appears, click the "Customize Report" link to add or remove fields from the report or to sort, filter, or group transactions.

Rainfall

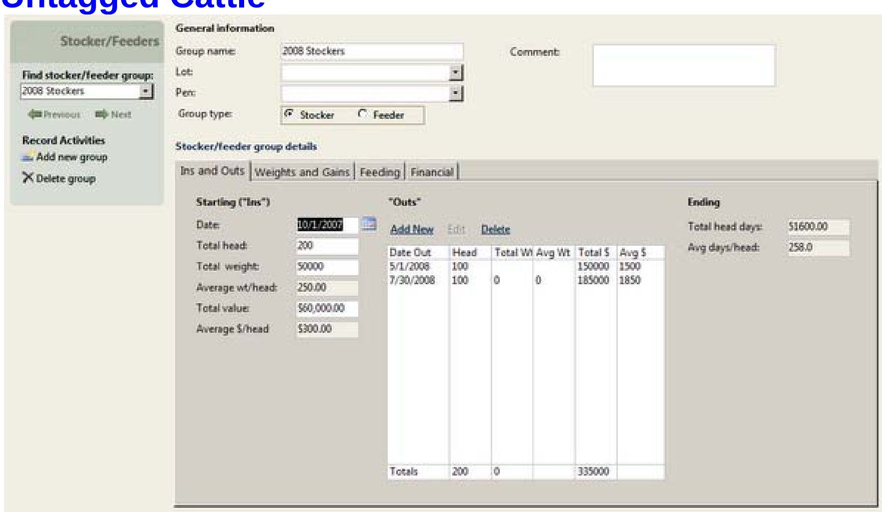


Maintain and display rainfall data records here. To enter a rainfall record, click "Add New". To modify or delete an entry, select the entry and click "Edit" or "Delete".

The rainfall records may be displayed for various time periods, including All, Today, This Week, This Month, This Year, Last Week, Last Month and Last Year.

To produce rainfall reports, select the Reports tab in your ribbon toolbar, click the "Reports" icon, and select "Rainfall" from the list. You can limit the range reported by using the filters. Enter "Rainfall Date" in the "Filter Where" box, and enter the desired date range.

Untagged Cattle



Select this option to maintain stocker/feeder group records for animals you wish to track on a group/lot basis rather than through individual records. To add a new group, click "Add new group". To remove the selected group, click "Delete group".

General Information

- Group Name: Name of the calf group. This is the name the group will be referred to throughout the program.
- Lot: The lot number for the group.
- Pen: The pen for the selected group.
- Group Type: Select Stocker or Feeder here.
- Comment: Enter any comments on the selected group.

Ins and Outs

<u>Starting ("Ins")</u>

Record information in the following fields:

- Enter the Starting Date
- Total Head
- Total Weight
- Average Weight Per Head (calculated by CattleMax CS)
- Total Value
- Average $ Per Head (calculated By CattleMax CS)

<u>"Outs"</u>

To record a removal transaction, click "Add New". Enter the date, total head removed, total weight, and total dollar value. The information in the gray boxes will be automatically calculated based on the information you enter.

<u>Ending</u>

The fields for Total Head Days and Avg Days/Head will be automatically calculated when you record the "Out" data.

Weights and Gains

<u>Gains</u>

This information is automatically calculated based on the records in the Ins and Outs screen.

<u>Check Weights</u>

To record check weights during the feeding period, click "Add New", and record the date and average weight for the group.

Feeding

When you enter the total pounds of feed here, the following fields will be automatically calculated based on previous records.

Carcass

Record average carcass data information here for the selected group.

Financial

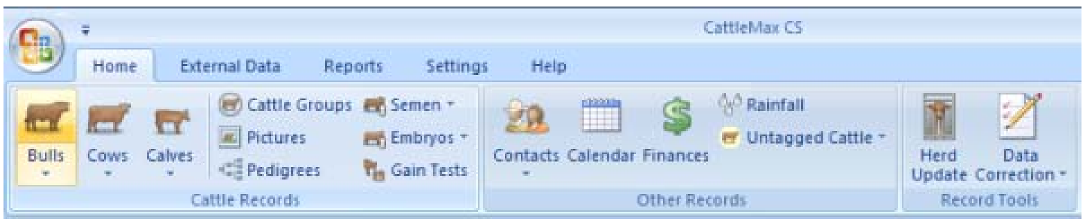
Record total costs for the categories listed here, and the cost per head and cost per head, per day will be automatically calculated.

Record Tools

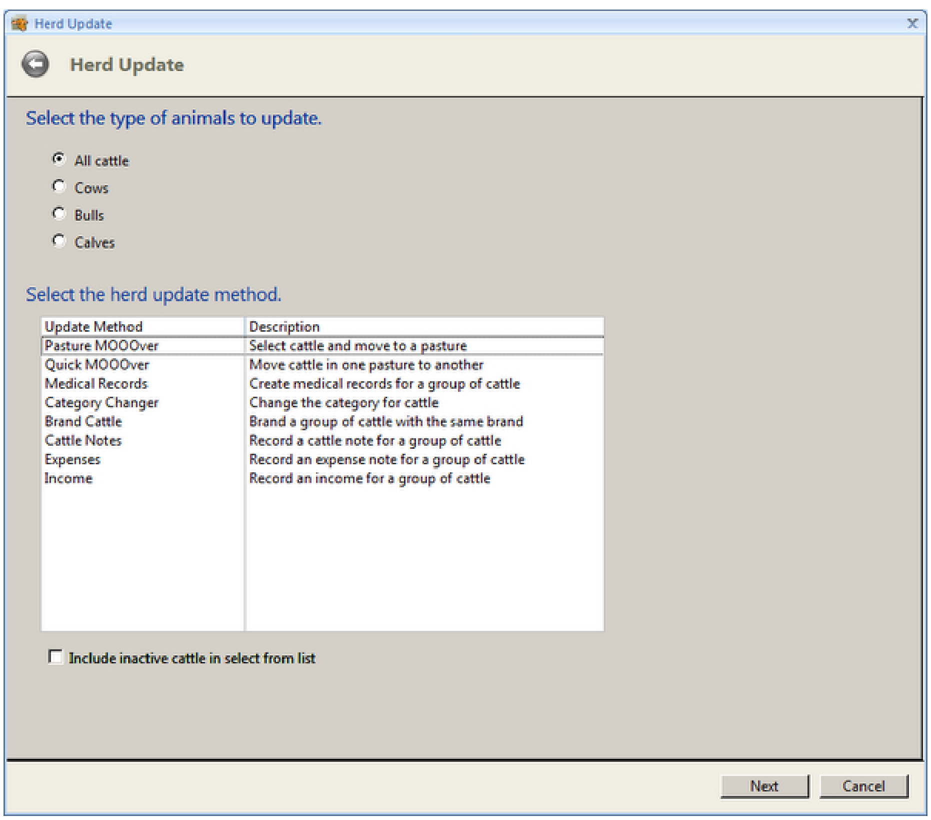
Herd Update

Herd Update is another method of updating many records at once. Once you select a group of cattle to work with, you can make as many group record updates as you need without having to reselect the cattle, and all of the individual records will be automatically updated.

Options include changing pasture information, categories, promoting cattle, and turning in bulls. The Herd Update icon is in the Record Tools section of the Home tab in the ribbon toolbar.



The Herd Update main selection screen displays the available herd update options for the type of animals to be worked. You can select All Cattle, Bulls, Cows or Calves.



Pasture Mooover
The Pasture Moover enables you to select cattle to be moved from one pasture to another.

1. Select the cattle to be moved. Select the cattle from the Active Cattle In the Herd box on the left, and click "Add" to move them to the Cattle To Update box on the right, then click "Next".
2. Select the destination Ranch and Pasture from the drop menu.
3. Click "Next" to update the selected cattle records with their new location.

Quick Mooover
1. Select the existing Ranch and Pasture.
2. Select the destination Ranch and Pasture.
3. Enter the Movement Date, then click "Next".

Medical Records
1. Select the animals to be medicated
2. Enter the treatment information.
3. The treatment information will be transferred to the individual cattle records.

Category Changer
1. Select the cattle to update.
2. Enter the new Category information and date of category change.
3. The records will be updated for the individual animals.

Brand Cattle
The Brand Cattle task enables you to brand a single animal or multiple cattle in a single transaction.
1. Select the animal or group of animals to be branded.
2. Enter the brand information.
3. The individual record(s) will be updated.

Expenses
1. Select the cattle to record the expense for.
2. Enter the expense details.
3. The individual records will be updated.

Income
1. Select the animals to record the income for.
2. Enter the income details.
3. The individual records will be updated.

Notes
The Cattle Notes task enables you to enter notes for a single animal or multiple animals.
1. Select the animals to record the Note(s) for.
2. Enter the note.
3. The individual records will be updated.

Calving
1. Select the cows that have calved.
2. Enter the calving details.
3. The individual cow records will be updated, and their offspring added to the Offspring tab. The individual calf records will be added to CattleMax.

Palpating
1. Select the cows that have been palpated.
2. Enter the palpation details. You have the option of marking all of the animals as palpated bred. The "Date Bred" field will automatically be calculated and the palpation details will be updated in each cow's breeding record.
3. The individual records will be updated.

Turn In Bulls
Record the date bulls are turned in to a pasture. All cows located in the pasture will be marked "exposed" to this bull in their breeding records.
1. Select the Bull(s) to be turned in.
2. Record the Ranch, Pasture and Turn In Date.
3. The bull's location record will be updated, and the cow's breeding records will be marked "exposed".

Pull Bulls
Use this transaction to remove bulls from pasture at the end of breeding.
1. Select the bull(s) to be pulled.
2. Record the Ranch, Pasture and Pull Date.
3. The bull's location information will be updated.

Change Feed Status
1. Select the calves to update.
2. Verify the calves to update.
3. The status change will be recorded in the individual calf records.

Castrate Calves
1. Select the calves to update.
2. Verify the calves to be castrated.
3. The calves will be marked "steers" in their individual records.

Dehorn Calves
1. Select the calves to dehorn.
2. Verify the calves to dehorn.
3. The individual calf records will be updated.

Wean Calves
1. Select the calves to be weaned.
2. Enter the weaning date and weights.
3. The individual calf records will be updated.

Yearling Calves
1. Select the calves to update.
2. Enter the yearling date and weights.
3. The individual records will be updated.

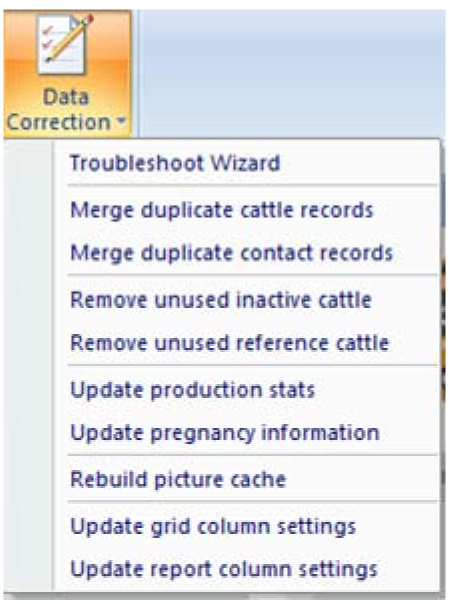
Promote Heifer Calves to Replacement Heifers
1. Select the calves to promote.
2. Verify the heifers to be promoted.
3. Enter promotion date and category.
4. The individual heifer records will be promoted to Replacement.

Promote Bull Calves to Developing Bulls

1. Select the bulls to be promoted.
2. Enter the promotion date and new category.
3. The invidual bull records will be promoted.

Data Correction

A variety of choices are available to help locate and correct possible problems with your cattle records to help maintain accuracy.



Troubleshoot Wizard
This tool helps locate potential problems, such as cattle with duplicate identifications or missing weaning weights, and enables you to view the record to make changes.

Merge duplicate cattle records
This tool enables you to merge breeding, offspring, and medical records from one record to another. This is useful when there are two or more individual records for the same animal, created by mistake.

Merge duplicate contact records
This tool enables you to merge information from one contact record to another. This is useful when there are two or more individual records for the same contact.

Remove unused inactive cattle
Removes cattle with an "Inactive" status with no offspring, medical or breeding records, nor are found in any pedigrees. This tool is most helpful when your records were converted from other sources, such as another software program.

Remove unused reference cattle
Removes cattle with a "Reference" status with no offspring, medical or breeding records, nor are found in any pedigrees. This tool is most helpful when your records were converted from other sources, such as another software program.

Update production stats
Updates the production calculations for cows such as last calving date and average calving interval, and should only be used if mentioned by a support representative.

Update pregnancy information
Updates pregnancy measures and classes specifically for the Standardized Production Analysis (SPA), and should only be followed if mentioned by a support representative, and where production years are used.

Rebuild Picture Cache
Rebuild the picture cache if a large number of pictures are changed/updated outside of CattleMax, if you move to a new computer, or have problems with your cached pictures.

Update Grid Column Settings
Rebuilds grid columns for record list screens, and resets all customizations (columns, column widths, sorts, filters, etc.) back to defaults. This accomplishes the same task as going to each list and choosing "Reset to Default".

Update Report Column Settings
Rebuilds grid columns and report columns for preset reports, and resets all customizations (columns, column widths, sorts, filters, etc.) back to defaults. This accomplishes the same task as going to each report and choosing "Reset to Default".

Production Years

***Note:** You must have Production Years enabled in your Preferences before you can set them up. To change your Preferences, select the Settings tab in your ribbon toolbar, click the "Preferences" icon, and then click the Preferences Tab. Make sure you have the option to "Enable Production Years" selected under the Breeding and Pregnancy Preferences heading.*

Production Years Setup

Select the Settings Tab in your ribbon toolbar, then click the "Production Years" icon in the Configuration section. Or, click the "Management" icon in your CattleMax Home screen, and select "Setup Production Years".

Production Year

To review a previous year, simply select the name of the production year from the list. To add a new year, click the new button. If you have 2 breeding seasons within a year, create them with the fall/spring designation in the production year name.

Fiscal Year (Required)

The fiscal year corresponds to the accounting or financial operating year of the farm or ranch business. This will be the fiscal year that will be used to prepare the total farm or ranch financial statements. The fiscal year should correspond to the year in which the calves being analyzed are weaned. Some ranch operations choose to base their fiscal year beginning and ending dates to correspond with the tax year (January 1 through December 31).

Type of Calving (Required)

Indicate the type of calving that best describes the calving season for the production year.

Dates (optional)

The following dates are specific to the production year. The number of days between each beginning and ending date will automatically be calculated.

Breeding Season

Include the starting and ending dates for the breeding season of this production cycle. This date should correspond with the majority of breeding activity for mature cows in the herd.

Pregnancy Testing

Enter the date range in which the cows are tested for pregnancy. This date should correspond with the majority of testing activity for mature cows in the herd.

Calving Season

Include the starting and ending dates for the calving season of this production cycle. This date should correspond with the majority of calving activity for mature cows in the herd.

Weaning

Include the starting and ending dates for the weaning season of this production year. This date should correspond with the majority of weaning activity for mature cows in the herd.

Add Cattle to Production Year

To add cattle to a production year, select the production year, then click "Next".

I wish to add cows by selecting them from a list

Use this option to see a list of all cows in the herd. From the list, you can individually select the cows you want to add. This option is especially useful for ranches with two calving types (spring and fall herds). Click "Next" to continue.

1. The next screen will be a list of cows in the herd. If you want to add cows that are not currently active, make sure to select the All Cows option. Notice there are two large boxes. The one on the left contains all of the cows in the herd depending on what type of cattle you selected in the previous screen. The box on the right will list the cow records you want to update. To select an animal, click on the animal from the box on the left. Then click the ">" button. The animal record you just selected will be displayed in the Cattle to Update box. Follow the same process to add more cattle.
2. On the last screen, click "Update" to complete the Production Year setup.

Displaying Cattle in a Certain Production Year

When you click the Bulls, Cows, or Calves records, the Find Cattle list will only list cattle added into the current production year. To view all cattle, choose All Cattle as the Production Year in the navigation area of the cattle records.

Default Production Year

If you want to change the default year so that only cattle in a certain season appear, choose the production year in the Production Years Setup screen and click "Set as Current Production Year". If you would like the cattle list to always show all active cattle regardless of their production year, click "Set Default to All Cattle" on the Production Years Setup screen.