

# AgriWebb + Figured setup checklist

A companion to the AgriWebb Certified Accountant Program, tick as you go.

## Getting connected

- ☐ Client has an active AgriWebb subscription
- ☐ You've sent an AgriWebb Connect invite from **Connect** → **Invite Client**
- ☐ Client has accepted and set your access level (not left as **No Access**)
- ☐ Client's farm appears in your Connect list

## Farm structure in AgriWebb

- ☐ Enterprises created for each business unit (breeding, trading, wool, agistment)
- ☐ Paddocks added to the farm map with the current land use
- ☐ Landmarks added where useful (water infrastructure, hazards, rain gauges)

## Livestock loaded

### MOB MANAGEMENT

- ☐ Mobs created with correct origin (bred or purchased), price per head, and enterprise
- ☐ Paddock entry date reflects when the mob was actually in the paddock

### INDIVIDUAL ANIMAL MANAGEMENT

- ☐ Animals imported via CSV (split by species) or live session
- ☐ Enterprise assigned to every animal
- ☐ Historical data backdated where relevant

## Mob structure decided

- ☐ Discussed mixed age vs tag colour with client
- ☐ Structure matches how animals are actually managed day-to-day
- ☐ If tag colour, client can confirm the number of animals per tag colour at all times of the year

## Ready for Figured integration

- ☐ Figured file exists with livestock trackers set up
- ☐ Required stock classes enabled in Figured
- ☐ Sales and Purchases accounts mapped on each tracker
- ☐ All AgriWebb transactions have an enterprise assigned
- ☐ Enterprises assigned to animals across the whole period being synced, not just from today
- ☐ Workflow decided: Option A (AgriWebb first) or Option B (accounting system first)

## Common gotchas to watch for

- **Paddock entry date** sets the earliest date any record can be added for a mob, decide upfront if backdating is needed.
- **Backdated data** needs to be entered chronologically, once records exist only Customer Support can adjust dates.
- **Enterprise backdating for Figured:** if animals are only assigned to their enterprise from today, historical stock will land in the reconciling column, not opening stock.
- **Financial workflows:** using both AgriWebb and Xero/MYOB as sources for sales and purchases will create duplicates in Figured.

For the full walkthrough, see Sections 2 and 5 of the AgriWebb Certified Accountant Program.