FARM FOCUS

FARM FOCUS STEP-BY-STEP SWITCHING GUIDE

Note: You can have multiple browser tabs open at the same time in Farm Focus. If you have the ability, it is recommended to run the program across two screens so that you can view various areas of Farm Focus and multiple farm businesses at one time, or have the Help Centre open to view the demonstration videos while you become familiar with the new software.

THE SWITCHING PROCESS:

1. Go to Farm Focus Website www.farmfocus.co.nz
   Select the Support tab and click on SWITCH TO FOCUS
   Read through the webpage & watch the short videos to familiarise yourself with Farm Focus and the key things you need to know.

   Read through the **4 steps to Switch**
   Book into one of the weekly Webinar sessions if you would like some more information on how Farm Focus works before you switch.
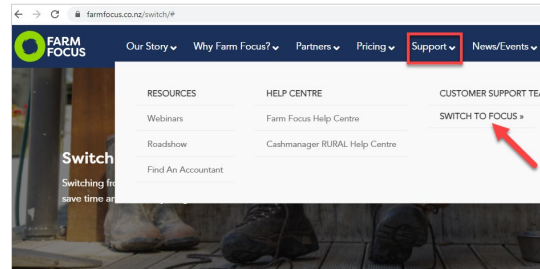
2. Log into Cashmanager RURAL to make sure all transactions are reconciled in Rural run Spring clean

   * Contact the RURAL support team if you need help with spring clean errors before you switch.
   https://community.crssoftware.co.nz/help-centre

   Check that you have the current financial year open in Cashmanager RURAL to ensure the correct information transfers to Farm Focus

   * check out our Cashmanager Help Centre about how to open a new financial year:
   https://community.crssoftware.co.nz/topic/168/how-do-i-create-a-new-financial-year?_=1628636948016&lang=en-US
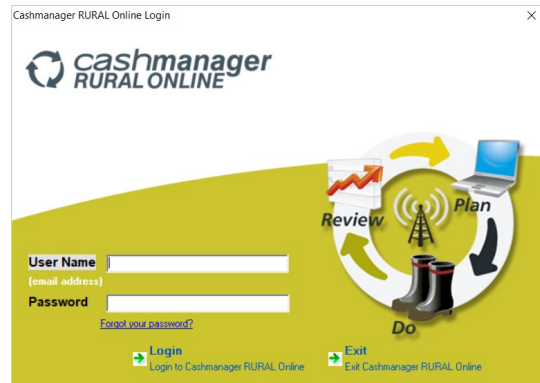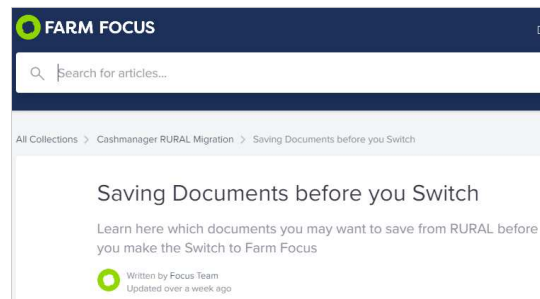

3. **(OPTIONAL)**
   Download a pdf. of your Accountants Annual Reports for each year from Cashmanager RURAL to have all your historic information stored safely.

   Follow the instructions from the help centre:
   https://help.farmfocus.nz/en/articles/4932626-saving-documents-before-you-switch

4. Go back to the Farm Focus Webpage and click to

Switch Now
You can choose to start a Demo so that you can have a look around Farm Focus and get to know the new look and feel before you switch your data across.

Make sure you select the **Switch to Focus** option and not the New Subscription.
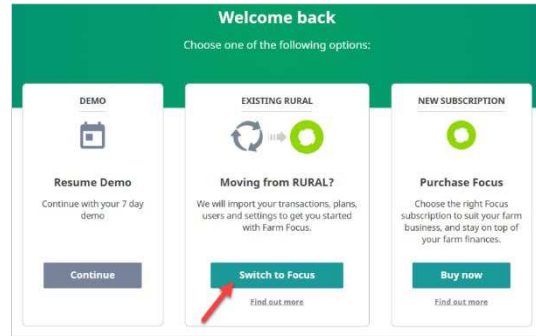
5. Check the boxes to confirm you are the Registrar of the account, your Spring clean is complete, and that all of your transactions in Rural are reconciled.

The transactions do not need to be entered up to today's date, just as long as any that are included have been reconciled.
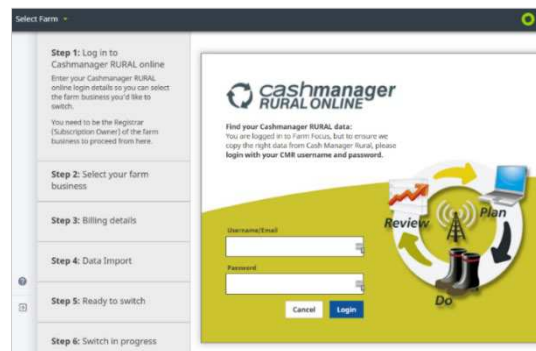
You can import your other transactions into Farm Focus to get up to date.

Scroll down to read things you need to know and click to **Confirm**

* Check in Cashmanager RURAL on the Transactions screen for any unreconciled transactions to ensure all is correct and complete before you switch.
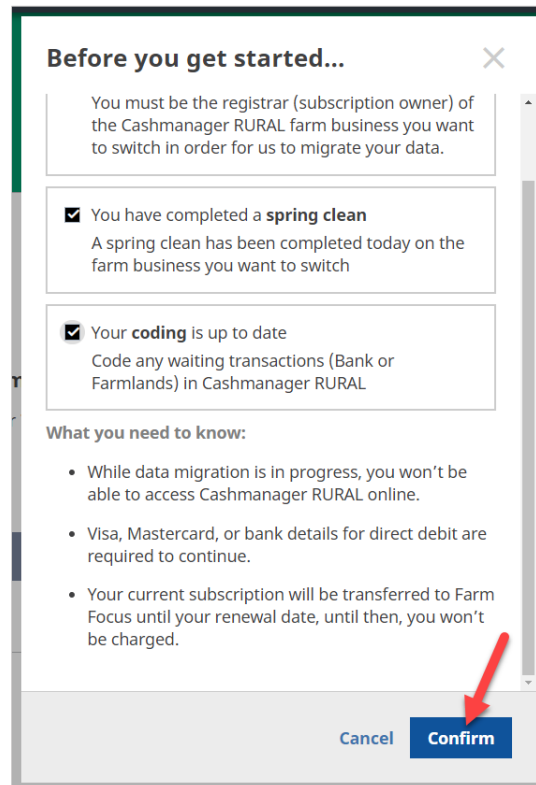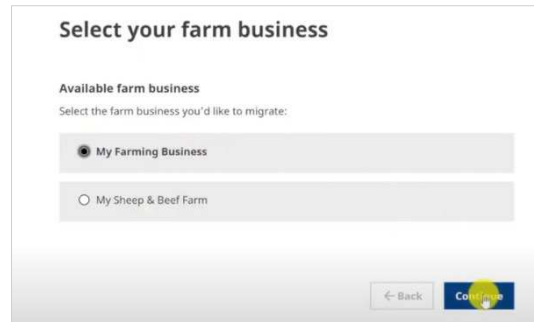

6. Enter your log in details for Cashmanager RURAL

**7.** Select your main farm from the list of available farm businesses to switch. Switch this one first.

You can switch one farm now and get used to Farm Focus and switch another farm at a later if you like.

8. Choose the type of subscription you want to purchase:

First business (Primary Sub) 1yr Farm Focus plan $790
Additional farms (Secondary subs) $690
Focus Limited $200 (150 coded lines)

See more on the Pricing Page of our website: https://www.farmfocus.co.nz/pricing/
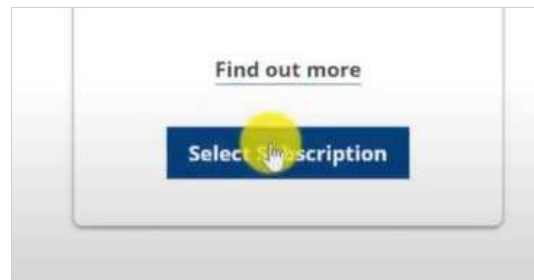
9. If you had **Enterprises** in Cashmanager RURAL, these are now called **Management Tags.** Management Tags help you to separate out income and expenses for different businesses that operate under the same GST number.

Read more about Management Tags and select the ones you wish to switch across.

You can skip this step and come back to it in your Settings Screen of Farm Focus.

** Find out more about Management Tags and Cost Tags on our Help Centre:
https://help.farmfocus.nz/en/articles/4718609-cost-tags-management-tags-tutorial*
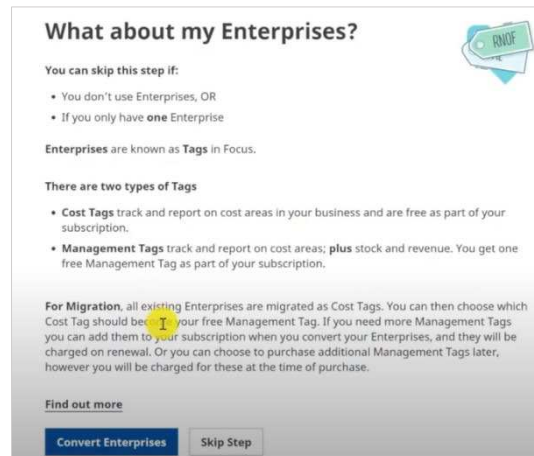
10. Read through the Terms and Conditions and scroll to the bottom to click to **Agree**

* Our End User Agreement states that we will keep your information in RURAL archived should you need to look back for audit reasons.
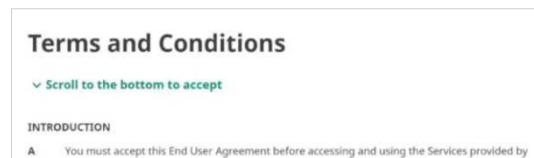
FARM FOCUS

11. Enter your Billing Details but please note that you will not be charged until your subscription renewal date
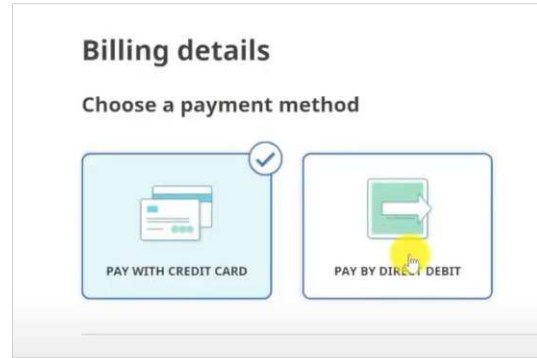
12. Select the data you want to switch across to Farm Focus – **we have alerted the options we recommend**.

    Which budgets do you want?
    * Ensure that your budget in Cashmanager is in either the current or future financial years so that you can select to bring that with you. If you don't select to bring them with you, you won't get another opportunity after you have switched.

    Which opening bank account and opening balances?

    Which livestock numbers?

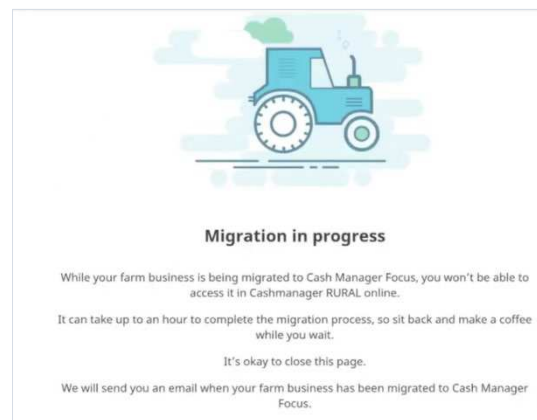   Click to **Continue** once you have made your selections.
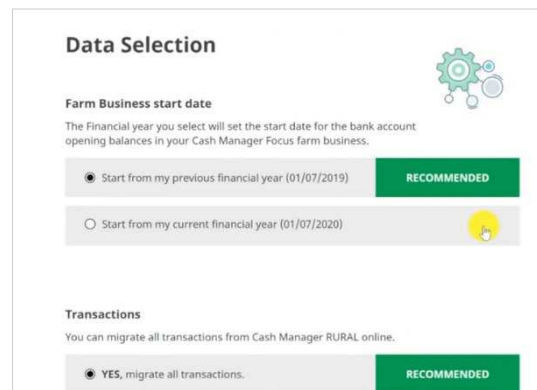
13. You are now ready to migrate your data. Click **Start Migration**
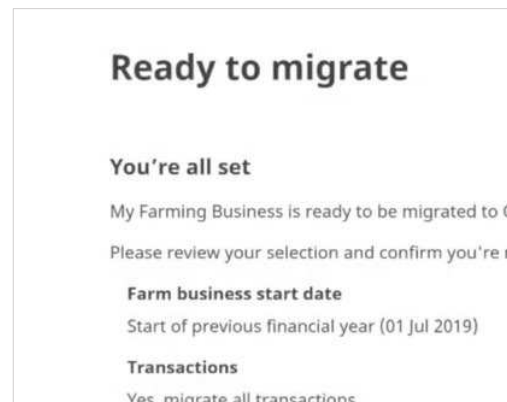
14. **Migration is now in progress**

    Refresh the browser after a couple of minutes to see if the migration is complete. You can also close the browser and come back later.

    Migration should take less than 10 minutes for most farm businesses.

15. Migrate another farm if you have multiple businesses to switch.
You can start the migration process for your next farm while your initial farm migration is still underway.

The Switch is now complete. You will be prompted to go through the Set-up process in Farm Focus to ensure that all your settings are correct your selected information has transferred.

THE SET-UP PROCESS:

16. ****OPTIONAL****
Download TeamViewer

TeamViewer will allow access for our Support Team to remotely access your computer and help you through any steps you might need assistance with.

See our Help Centre topic about downloading TeamViewer:
https://help.farmfocus.nz/en/articles/5541875-how-to-install-teamviewer

Or visit www.teamviewer.com/en-us/ to click on the Download button to start the installation process.
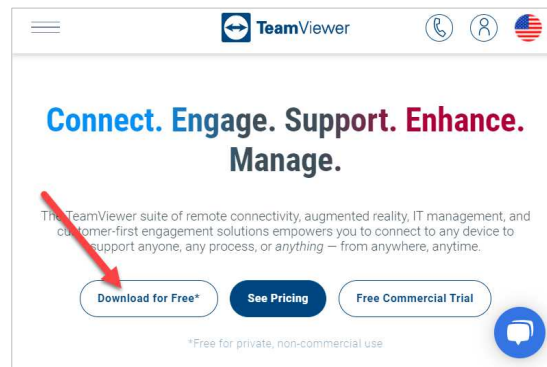

17. **Farm Business**

This includes basic information about your farm business such as Trading name, entity type and address.

This address will be in your tax invoices and meets IRD regulations for invoicing.

Your effective farm area is important to include for KPI information in your EFS Report and Livestock Trading Report

Enter your information and don't forget to click **Save**
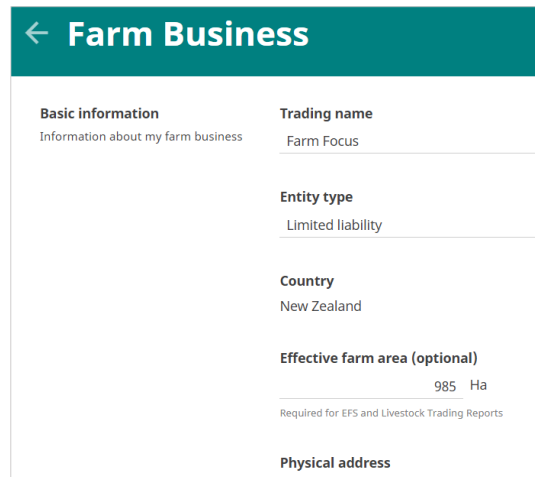
18. Users

Invite members of your Trusted Team to have access to your information.

Click **Add User**, type in the email address and select the Access level you want them to have. Click to **Send Invite.**

* The access levels have changed from Cashmanager RURAL and so you will need to re-invite your team.

Recommendations:

Organisation Admin for accountants *allows your accountant to map all of their codes, and have full access to the software.*

Restricted User for Farm Consultants or Advisors *who want to access the Cashflow and Reports and make changes, but not be able to adjust the codes.*

Reporting Access for Bankers or staff members *allows them to see information but at a Read Only level.*

19. Financial

This includes your GST information and balance date.

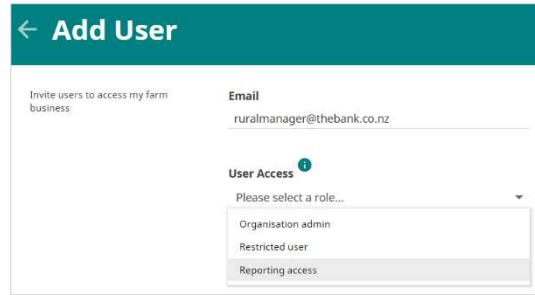** You can input the GST basis and frequency from within your GST Report.*

Enter your information and click **Save.**

Financial Details

GST
Set up my farm's GST details

Please note, you will not be able to use this feature during your demo.

GST registered
Yes

GST number
100 100 100

GST basis
- Payments
- Invoice

GST frequency
1 monthly

20. Bank Accounts

The bank accounts you had set up in RURAL will be showing here as **Active**.

Check that your bank account details are correct. You can add in overdraft limits and interest rates so that these costs calculate automatically in your budgets.
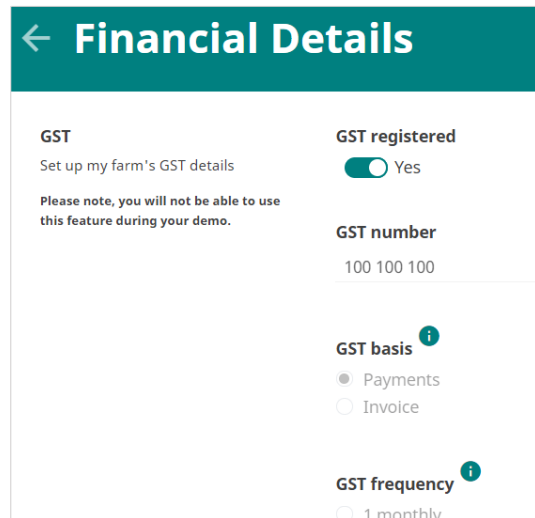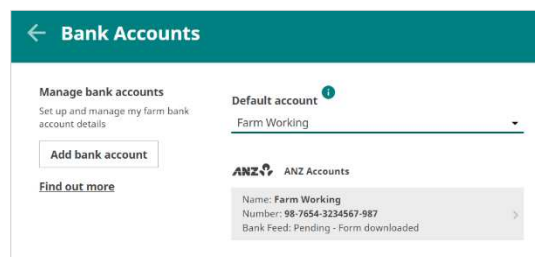
Bank Accounts

Manage bank accounts
Set up and manage my farm bank account details

Add bank account

Find out more

Default account
Farm Working

ANZ **ANZ Accounts**
Name: **Farm Working**
Number: **98-7654-3234567-987**
Bank Feed: Pending - Form downloaded

* It is recommended to have direct bank feeds set up. If you don't already have this set up then you can download the bank feed form within your Bank Account settings. The form will only be available to download if your bank has direct feeds with Farm Focus.
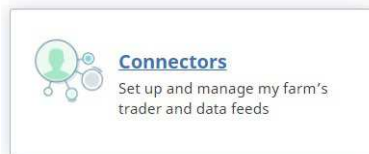
21. Tags

Tags were known as Enterprises in Cashmanager RURAL. Your Tags will be listed under Cost Tags, you can upgrade them to be Management Tags if you haven't already completed this as part of the migration process.
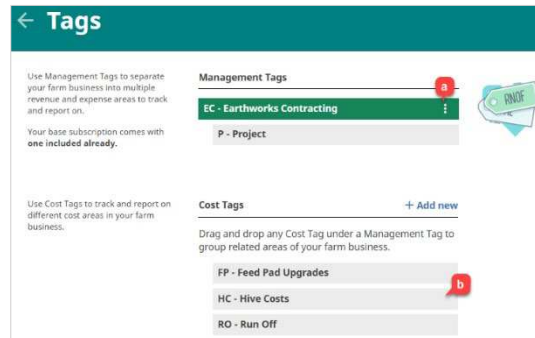
* Cost Tags track costs only. Management Tags track income AND costs.

22. Connectors

Your Farmlands or Farmsource direct feeds you had set up in RURAL will be active in Farm Focus.

The invoice scanner is new. Click into Invoice Scanner to **Connect** this for your business. This application will allow you to email your invoices directly into Farm Focus, read the invoices, and auto-populate your lines for coding.

WHAT TO CHECK WHEN YOU FIRST LOG-IN:
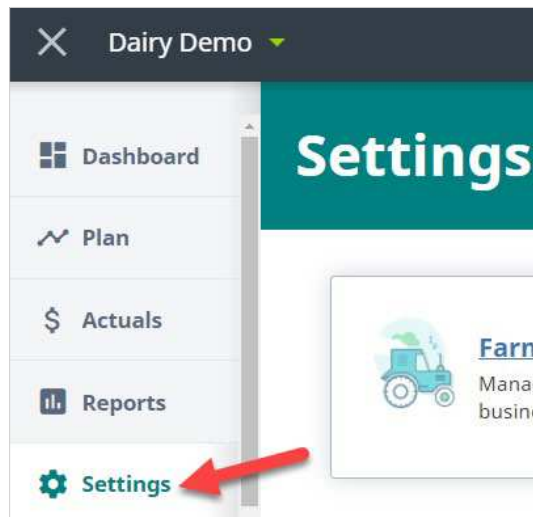
23. You can log into Farm Focus anytime at www.farmfocus.nz or use the Login button from our webpage.

24. Use the Dropdown at the top of the screen to switch between farms.

You can have multiple browsers open at the same time so that you can operate in several farms at once.

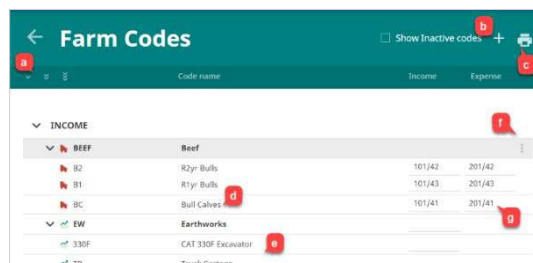**25.** Click down the side navigation menu into **Settings**

26. i) Codes

Your Farm Code list will switch across from RURAL but your **Coding Rules and Split Codes do not come with you.**
This is a good time to review your code list.
a. Use the chevrons to drop down in your list
b. Select the + icon to add a new category, code or extended code
c. Print your code list
d. Click into a Livestock Code to check the new selections for Carcass weight, Payment Delays and Ageing Up
e. Drag and Drop your codes into the order you prefer
f. Click on the three menu dots to see your options about editing,

Print out your Autocoding list from Cashmanager RURAL:
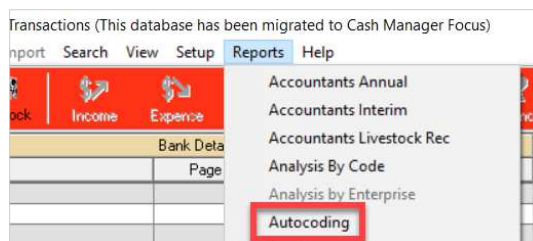
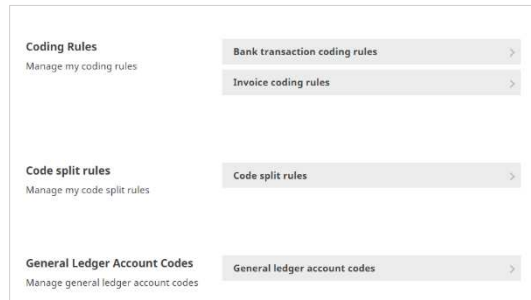deactivating or deleting a code (you can see your deactivated codes when you check the "Show Inactive Codes" box

g. Your accountant can map their codes for their General Ledger reports

ii) Coding Rules
Print out your Auto Codes from RURAL. These will not transfer to Farm Focus due to an improved criteria for coding rules. Code split rules also don't migrate. Create new ones and check the GST splits are correct on the IRD website, or with your accountant.
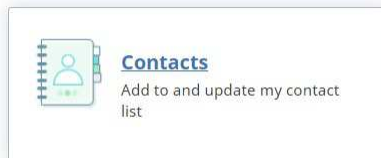
Coding Rules:

Coding Rules	Bank transaction coding rules	>
Manage my coding rules	Invoice coding rules	>
Code split rules	Code split rules	>
Manage my code split rules		
General Ledger Account Codes	General ledger account codes	>
Manage general ledger account codes		

27. Livestock

Livestock
Manage my opening and closing livestock values and weights. This contributes to the EFS Report.

Enter your opening and closing **Livestock Values**. This will drive your Livestock Adjustments in your EFS report.
Enter your opening and closing **Livestock weights** to determine the efficiencies of your meat production.

← **Livestock**

| Manage livestock values and weights to contribute toward management reports | Livestock Values | > |
| | Livestock Weights | > |

28. Contacts

Contacts
Add to and update my contact list

Other Party in Cashmanager RURAL is now called **Contact**s.
Go through and delete or deactivate any contacts you don't use to tidy up the list.
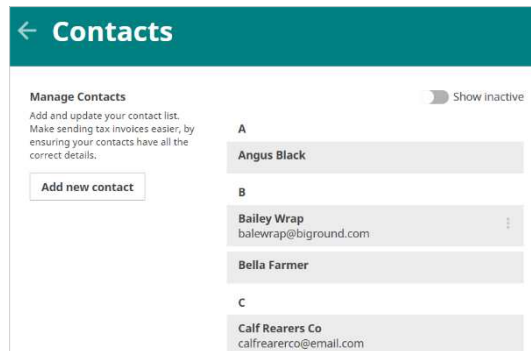
You can update your contacts to include bank account information so that you can send your bill payments from Farm Focus to your online banking.
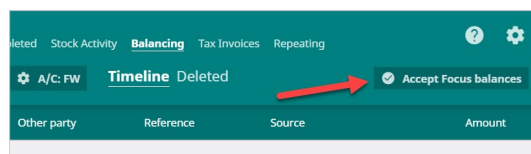
← **Contacts**

Manage Contacts		Show inactive
Add and update your contact list. Make sending tax invoices easier, by ensuring your contacts have all the correct details.	A	
	Angus Black	
Add new contact	B	
	Bailey Wrap balewrap@biground.com	
	Bella Farmer	
	C	
	Calf Rearers Co calfrearerco@email.com	

* The existing Postal Addresses from Cashmanager RURAL might need some updating to comply with IRD Tax Invoice requirements

29. Balancing
Go into your **Actuals Tab** on your Navigation menu and select **Balancing**.

Balancing was known as Reconciling in Cashmanager RURAL.

As you code your transactions and invoices your balancing will automatically

...leted	Stock Activity	**Balancing**	Tax Invoices	Repeating	? ⚙
⚙ A/C: FW	**Timeline** Deleted				✓ Accept Focus balances
Other party		Reference		Source	Amount

match, so there is no more manual Reconciling.

When you first switch you will need to update your Balancing by clicking on **Accept Focus Balances** button.
If everything was reconciled up to date before you switch, then it will balance.
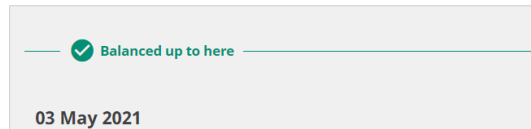
** If you have issues with Balancing you can visit our Help Centre for Balancing Troubleshooting:*
https://help.farmfocus.nz/en/articles/5257126-balancing-troubleshooting

30. **GST Report set up**

Under the **Reports** tab of your Navigation Menu, click into **GST Reports**.

Click into the Settings cog to ensure the GST frequency and basis is correct. You can alter them if not.

The first time you file with IRD directly from Farm Focus you will be prompted to log into MyIR. This will only activate if the GST numbers are correct and match, and if the person logging in has the correct authorisation.

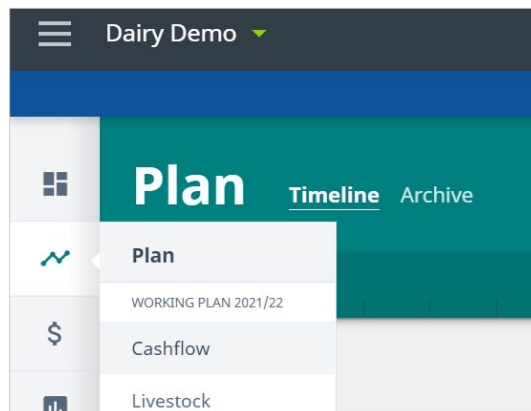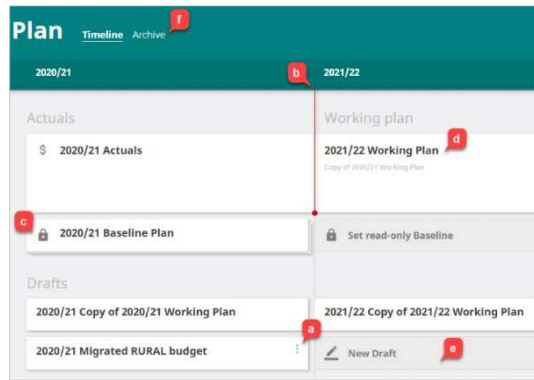Every subsequent filing will happen automatically when you click **Save Final & File with IR**
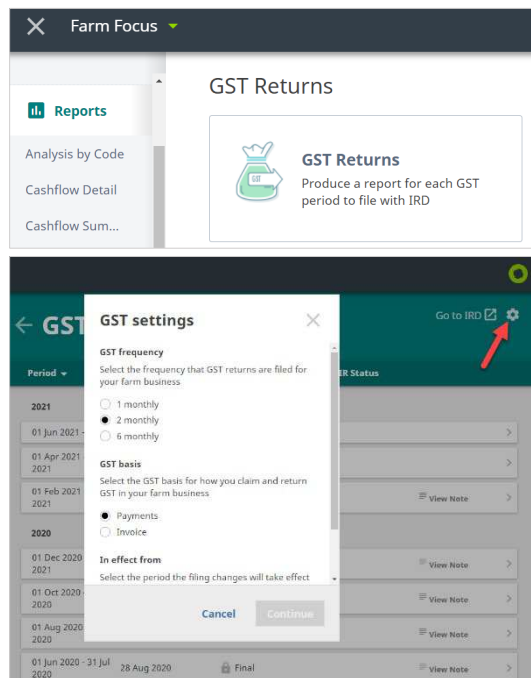
31. **Working Plan**

Your Working Plan encompasses your Cashflow and your Livestock flow.

a) Your migrated budget from RURAL will be sitting in the Drafts section. Click the three dots to upgrade this to your current Working Plan
b) The red revision line shows where we are up to in the year. You can set this line back if you need.
c) A Baseline Plan is a read only copy of your Working Plan at any given time that you set it, so that you can compare back to previous versions of your cashflow.
d) Create a Plan for next year
e) Create as many Draft Plans as you like to test different scenarios or business opportunities.

Archive any of the Plans if you would like to tidy up the Working Plan Landing Page

You are all set up and Ready to Go!