

# How to Set Up People

## How to Create Contacts and Operators

1. Navigate to Setup -> People
2. Click 'Manage' and then select '+ Add Contact' in the drop down box
3. Enter the name of the person and any other required fields
4. Navigate to the system access tab and select if you would like the person to be able to access the system (ie. Login to FarmENGAGE)
  - a. An email address is required to enable access to the system and this user will be counted as one of the five included user licenses
5. Navigate to the Equipment operator tab and tick the box if you would like the equipment operator to be able to access your equipment e.g. tractor. Fill out any details as required
  - a. See section 3: 'Setting Operator Permission Levels' for more details on what access is given for each permission level


The screenshot displays the 'Contact Properties' page in the FarmENGAGE system. At the top, there are navigation tabs for 'PEOPLE', 'CONTACTS', and 'PARTNERSHIPS'. The 'CONTACTS' tab is active. Below the navigation, the page is titled 'Contact Properties'. On the left side, there is a profile picture placeholder with an 'UPDATE PHOTO' button. Below this are input fields for 'First Name \*', 'Last Name', 'Job Title', and 'Email'. The main content area is divided into three tabs: 'Info', 'System Access', and 'Equipment Operator'. The 'Equipment Operator' tab is selected. Under this tab, there is a checked checkbox for 'Equipment Operator'. Below this, there are input fields for 'Applicator License' and 'Unit Cost' (with a '/ hr' unit indicator). There is also an unchecked checkbox for 'Trimble Display Access'. A yellow warning box states: 'Operator display sign in: OFF Operators currently aren't asked to sign in to any of your Trimble displays'. Below this, there are input fields for 'Sign In ID' and '4 Digit PIN \*'. At the bottom, there is a dropdown menu for 'Operator Permission' set to 'Level 6: Full Access'. On the right side, there is a 'Groups(s)' section with a message: 'There are no groups defined for your organization.' and a 'Manage Groups' link.

## Editing Operator Details

1. Navigate to Setup -> People
2. In the list of operators, click the three dot symbol next to the operator you want to edit and select 'edit' in the drop down list
3. Change any fields, as required and then click Save.

PEOPLE CONTACTS PARTNERSHIPS

Contact Properties

  
[UPDATE PHOTO](#)

First Name \*

Last Name

Job Title

Email

Info System Access **Equipment Operator**

**Equipment Operator**

Applicator License

Unit Cost  / hr

**Trimble Display Access**

Operator display sign in: OFF Operators currently aren't asked to sign in to any of your Trimble displays.

Sign in ID

4 Digit PIN \*

Operator Permission

Group(s) There are no groups defined for your organization. [Manage Groups](#)

## Setting Operator Permission Levels

1. If Operator display sign in is set to 'Off' you must turn this on
2. On the Contacts page, use the 3-dot menu to select "Edit"
3. From the Contact Properties page select the "Equipment Operator" tab
4. Checkmark the Trimble Display Access option
5. On the Operator Permissions options, select a permission level
  - a. See the chart below for the permissions associated with each level

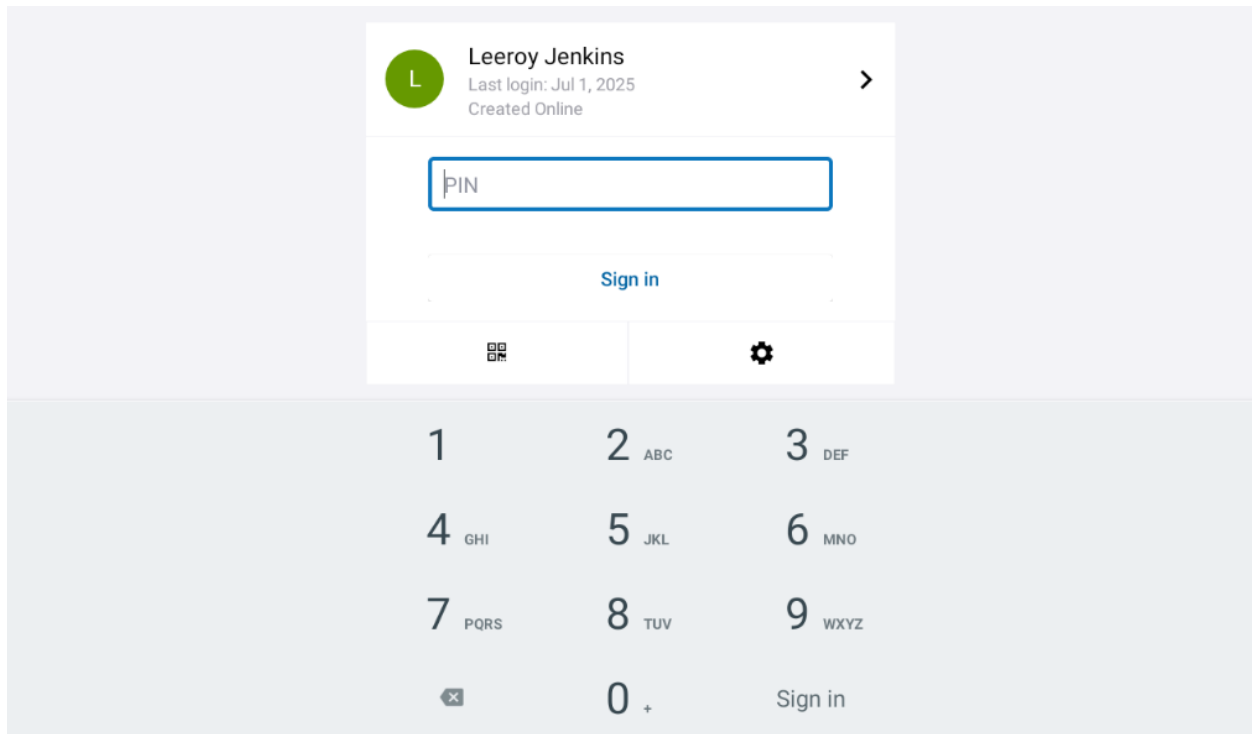
The screenshot shows the 'Contact Properties' page for a contact named Davis Thompson. The 'Equipment Operator' tab is active, displaying the following settings:

- Equipment Operator** (checked):
  - Applicator License: [Empty text box]
  - Unit Cost: [Empty text box] / hr
- Trimble Display Access** (checked):
  - Operator display sign in: OFF Operators currently aren't asked to sign in to any of your Trimble displays - [Change](#)
  - Sign In ID: First and last name
  - 4 Digit PIN: 1234
  - Operator Permission: Level 6: Full Access

On the right side, there is a 'Group(s)' section with a message: 'There are no groups defined for your organization.' and a 'Manage Groups' link.

At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

- When the operator turns on the display, they will be prompted to use their PIN to enter the display



### Permission Levels - Summary

Precision-IQ Feature	Level 6	Level 5	Level 4	Level 3	Level 2	Level 1
Select	Enabled	Enabled	Enabled	Enabled	Enabled	Enabled
Edit	Enabled	Enabled		Enabled		
Add	Enabled	Enabled	Enabled			
Delete	Enabled					
Runscreen access	Enabled	Enabled	Enabled	Enabled	Enabled	(Limited)
Field Manager	Enabled	Enabled	Enabled	Enabled		
Settings	Enabled	Enabled	(Limited)	(Limited)		



## Creating a New Operator Group

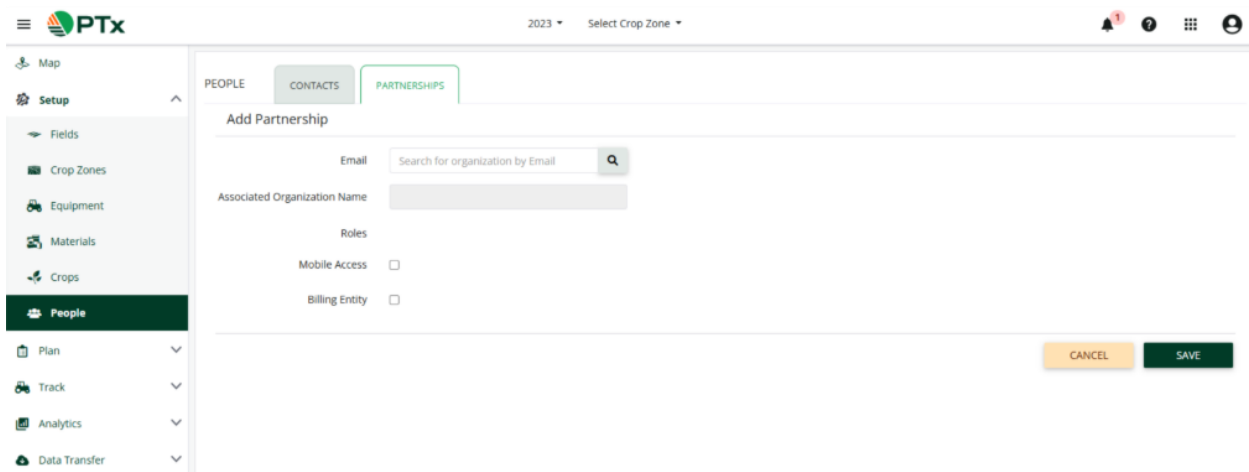
1. Click on the manage dropdown and create a new Contact or Edit an existing Contact
2. Go to the Equipment Operator tab and enable the Equipment Operator
3. In the Group(s) section on the right-hand side of the page, select Manage Groups to create or edit an Operator Group

The screenshot shows a dialog box titled "Operator Groups" with a close button (X) in the top right corner. Below the title bar is an empty text input field with a "+ ADD" button to its right. Underneath is a list titled "Operator Groups" containing two items: "North Employees" and "Mark's Group", each with a three-dot menu icon to its right. At the bottom right of the dialog is a "CLOSE" button.

3. Enter a name for the new operator group in the empty box and then click on +ADD. If you are coming to this dialog from the Alerts page, groups can also be edited or deleted from this dialog box.

## How to add Partnerships

1. Navigate to Partnerships tab
2. Click “Add Partner”
3. Enter the partners email address and click the search icon
4. Select one or more roles from the matching results, including: Precision Workbench User, Reseller, etc.
5. Click the checkbox to enable/disable Mobile Access
6. Click “Save”




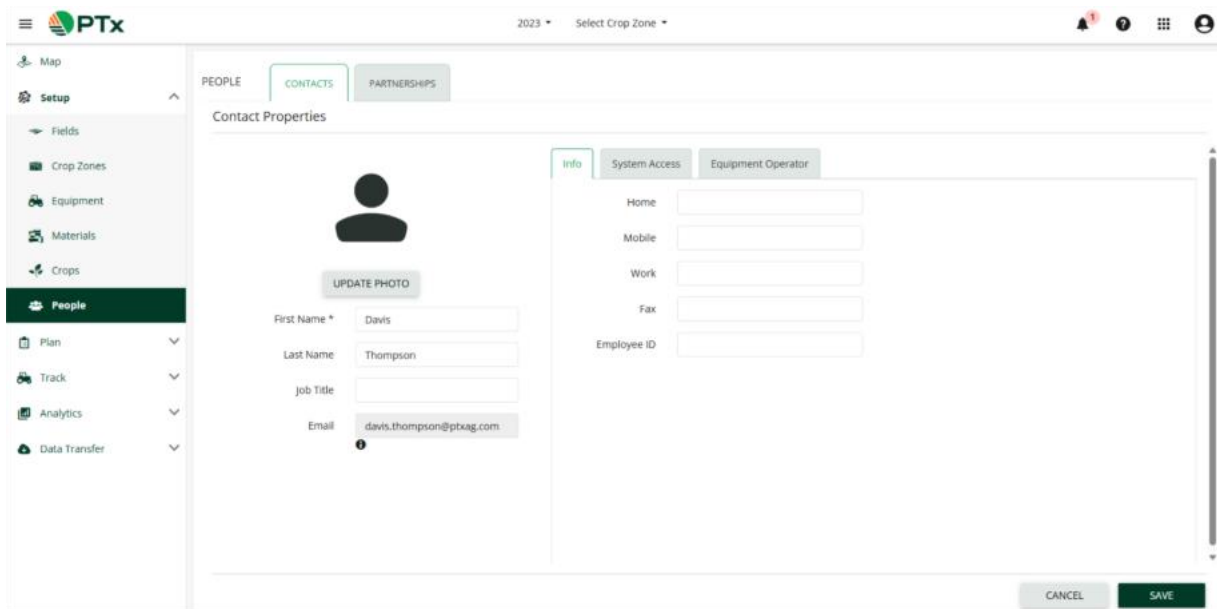
The screenshot displays the PTx web application interface. The top navigation bar includes the PTx logo, the year 2023, a dropdown for 'Select Crop Zone', and notification, help, and user icons. A left sidebar menu lists various setup options: Map, Setup (with a sub-menu for Fields, Crop Zones, Equipment, Materials, and Crops), People (highlighted in green), Plan, Track, Analytics, and Data Transfer. The main content area is titled 'Add Partnership' and features three tabs: PEOPLE, CONTACTS, and PARTNERSHIPS (which is active). The form contains the following fields and controls:

- Email:** A search input field with the placeholder text 'Search for organization by Email' and a search icon.
- Associated Organization Name:** A text input field.
- Roles:** A section header for role selection.
- Mobile Access:** A checkbox.
- Billing Entity:** A checkbox.

At the bottom right of the form, there are two buttons: a yellow 'CANCEL' button and a green 'SAVE' button.

## How to Edit People

1. Navigate to setup > people
2. Select Contacts or Partnerships
3. Click the three dots icon  on the right of the person and select 'edit'
4. Make any required changes and click 'Save'



The screenshot displays the PTx software interface. On the left is a navigation sidebar with a 'Setup' section containing 'Fields', 'Crop Zones', 'Equipment', 'Materials', and 'Crops'. The 'People' section is highlighted in green and includes 'Plan', 'Track', 'Analytics', and 'Data Transfer'. The main content area is titled 'Contact Properties' and has tabs for 'PEOPLE', 'CONTACTS', and 'PARTNERSHIPS'. The 'CONTACTS' tab is active. Below the tabs is a profile card for a person named Davis Thompson, with an 'UPDATE PHOTO' button. To the right of the profile card are input fields for 'Home', 'Mobile', 'Work', 'Fax', and 'Employee ID'. At the bottom right of the form are 'CANCEL' and 'SAVE' buttons.

PTx 2023 Select Crop Zone

Map Setup

Fields

Crop Zones

Equipment

Materials

Crops

**People**

Plan

Track

Analytics

Data Transfer

PEOPLE CONTACTS PARTNERSHIPS

Contact Properties

Info System Access Equipment Operator

Home

Mobile

Work

Fax

Employee ID

UPDATE PHOTO

First Name \* Davis


Last Name Thompson

Job Title

Email davis.thompson@ptxag.com

CANCEL SAVE

## How to Delete People

1. Navigate set-up > People
2. Navigate to the tab of the person you want to retire
3. Click the three dots icon  on the right of the person and select 'Delete'
4. Select 'Yes' on the pop-up to delete the person

