

Initial Organization Creation and Management

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First-Time Organization Settings Setup

When you sign in to your online account for the first time, you'll be prompted to fill in some basic information for your account organization, as shown below.

1. Name your organization to match your business (for example, Smith Farms)
2. Select your Country, Time Zone, Units of Measure & Currency Symbol.

Get started by entering your initial settings.

Organization Name	<input type="text" value="Davis Thompson"/>
Country	<input type="text" value="United States"/>
Time Zone	<input type="text" value="(UTC-07:00) Mountain Time (US & Canada)"/>
Units of Measure	<input type="text" value="U.S."/>
Currency Symbol	<input type="text" value="\$"/>

NEXT

Update Organization Settings

1. Click the user icon in the top-right corner of the site
2. Select Manage Organizations from the dropdown
3. Click the Pencil icon next to the organization you want to update
4. Make any necessary changes and click 'Save'

Organization Name	Auto Sign in	ID	
<input type="checkbox"/> Marty Rouelle - Rogue	<input type="checkbox"/>	1081	
<input type="checkbox"/> Nathan's Org	<input type="checkbox"/>	175398	
<input type="checkbox"/> Advisor Business Company	<input type="checkbox"/>	175402	
<input type="checkbox"/> Cowtown Ag Consulting - Prime	<input type="checkbox"/>	175538	
<input type="checkbox"/> Scott's Enterprise Company	<input type="checkbox"/>	175543	
<input type="checkbox"/> Farmer Core_20200601	<input type="checkbox"/>	175771	
<input type="checkbox"/> QA- Advisor Org	<input type="checkbox"/>	176420	
<input type="checkbox"/> Sophia Capello - pro	<input type="checkbox"/>	176574	
<input type="checkbox"/> Sophia Capello - core	<input type="checkbox"/>	176590	
<input type="checkbox"/> pro test	<input type="checkbox"/>	176733	
<input type="checkbox"/> Client from company	<input type="checkbox"/>	176759	
<input type="checkbox"/> Swasti - Rogue Business	<input type="checkbox"/>	176788	
<input type="checkbox"/> TOrganization	<input type="checkbox"/>	176847	
<input type="checkbox"/> 1. Mobile Test RO	<input type="checkbox"/>	176890	
<input type="checkbox"/> 2. Mobile Test RO	<input type="checkbox"/>	176891	
<input type="checkbox"/> 3. Mobile Test RO	<input type="checkbox"/>	176892	
<input type="checkbox"/> Nov 27 - TAS - Data UI Test	<input type="checkbox"/>	176921	

Update User Settings

1. Click the user icon in the top-right corner of the site
2. Select Settings from the dropdown
3. Here you can edit your user settings

The screenshot shows the PTx user settings interface. The top navigation bar includes the PTx logo, the year 2023, and a 'Select Crop Zone' dropdown. The sidebar on the left contains 'Back', 'Licenses', 'Settings' (highlighted), and 'Manage Organizations'. The main content area is titled 'Language' and contains the following settings:

- Language:** Language is determined by your browser language settings.
- Time Zone (required):** A dropdown menu currently showing '(UTC) Coordinated Universal Time'.
- Purchaser Org (required):** A dropdown menu currently showing 'Choose...'.
- Last Location (required):** A dropdown menu currently showing 'Field Name'.
- Unit System (required):** A dropdown menu currently showing 'U.S.'.
- Customize Unit System

A 'SAVE' button is located at the bottom right of the settings panel.

User Settings Unit System vs Organizations Settings Unit System

There are two different levels of Unit handling within FarmENGAGE.

The first is at the organization level, this controls:

1. The default units used in backend processing to ingest data to the organization, or export data and reports when there is no direct user interaction.

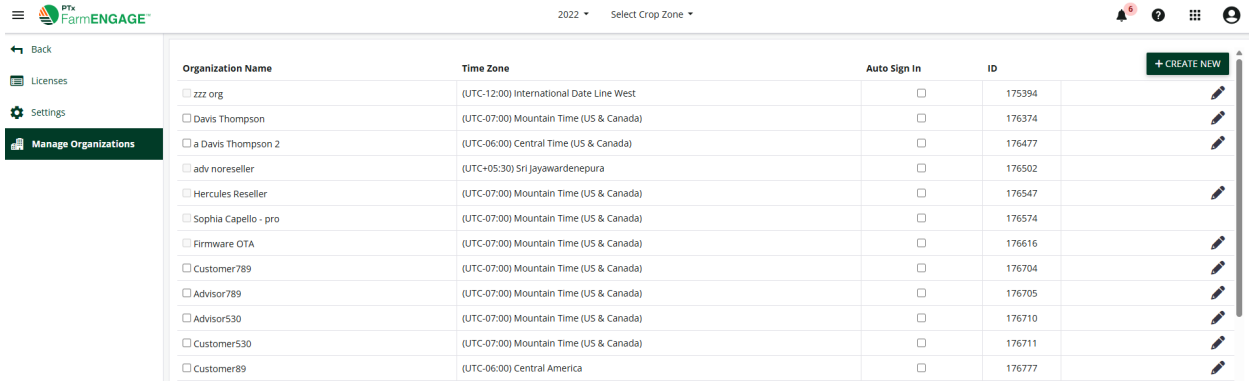
The second is at the user level, this controls:

1. The user's preferred units to show in the user interface (specific to each user in the organization)

Manage Organizations

Access a list of all organizations you are a member of and manage settings

1. Click the user icon in the top-right corner of the site
2. Select Manage Organizations from the dropdown
3. Here you can see all organizations you are a member of
 - a. Click the Auto Sign In checkbox to sign in with that specific organization automatically
 - b. Click the pencil icon to edit the organization
 - c. Click on the Create New button to create a new unlicensed organization

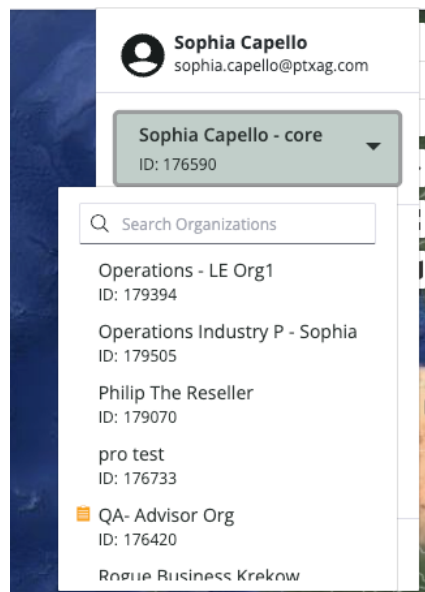
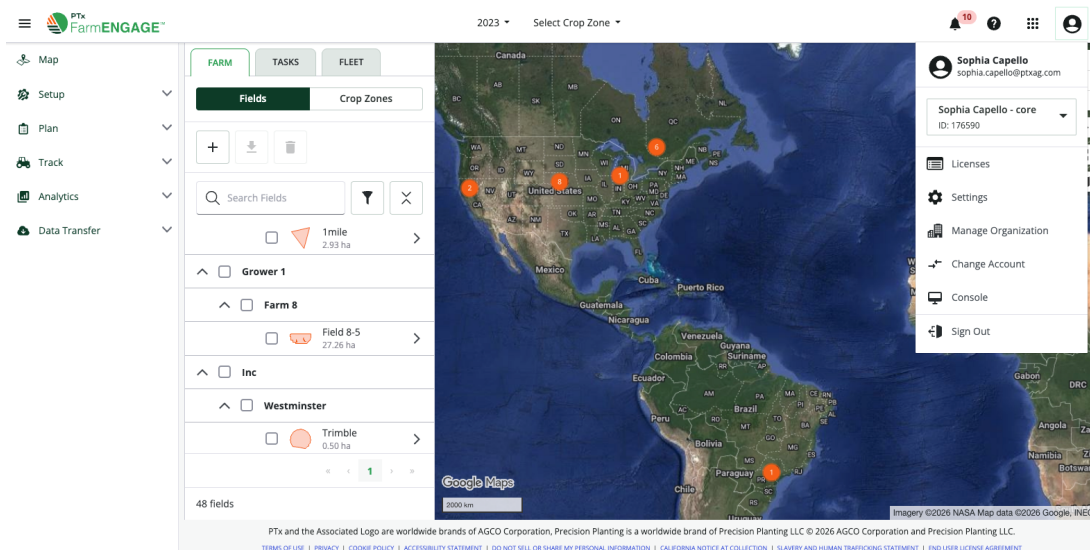


Organization Name	Time Zone	Auto Sign In	ID	
<input type="checkbox"/> zzz org	(UTC-12:00) International Date Line West	<input type="checkbox"/>	175394	
<input type="checkbox"/> Davis Thompson	(UTC-07:00) Mountain Time (US & Canada)	<input type="checkbox"/>	176374	
<input type="checkbox"/> a Davis Thompson 2	(UTC-06:00) Central Time (US & Canada)	<input type="checkbox"/>	176477	
<input type="checkbox"/> adv noreseller	(UTC+05:30) Sri Jayawardenepura	<input type="checkbox"/>	176502	
<input type="checkbox"/> Hercules Reseller	(UTC-07:00) Mountain Time (US & Canada)	<input type="checkbox"/>	176547	
<input type="checkbox"/> Sophia Capello - pro	(UTC-07:00) Mountain Time (US & Canada)	<input type="checkbox"/>	176574	
<input type="checkbox"/> Firmware OTA	(UTC-07:00) Mountain Time (US & Canada)	<input type="checkbox"/>	176616	
<input type="checkbox"/> customer789	(UTC-07:00) Mountain Time (US & Canada)	<input type="checkbox"/>	176704	
<input type="checkbox"/> Advisor789	(UTC-07:00) Mountain Time (US & Canada)	<input type="checkbox"/>	176705	
<input type="checkbox"/> Advisor530	(UTC-07:00) Mountain Time (US & Canada)	<input type="checkbox"/>	176710	
<input type="checkbox"/> Customer530	(UTC-07:00) Mountain Time (US & Canada)	<input type="checkbox"/>	176711	
<input type="checkbox"/> Customer89	(UTC-06:00) Central America	<input type="checkbox"/>	176777	

How to Switch Between Organizations

If you are a member of multiple organizations, you can easily switch between them using the organization picker.

1. Click the user icon in the top-right corner of the site
2. Your current organization will be displayed
3. Click the organization name to open a dropdown list of all organizations you have access to
4. Use the search bar to find a specific organization. You can search by:
 - a. Organization name
 - b. Organization ID
5. Select the organization you want to access
6. The site will reload and switch you to the selected organization



Manage Licenses

1. Click the user icon in the top-right corner of the site
2. Select Licenses from the dropdown
3. Expand each section to view the active license(s) on the organization including the demo status, the effective and expiration dates, and devices.

The screenshot displays the PTx FarmENGAGE interface for managing licenses. The top navigation bar includes the PTx FarmENGAGE logo, the year 2023, a 'Select Crop Zone' dropdown, and notification, help, and user icons. The left sidebar contains navigation links: Back, Licenses, Settings, and Manage Organizations. The main content area is titled 'LICENSES' and features two tabs: 'CURRENT LICENSES' (active) and 'MARKETPLACE'. A message states: 'This screen shows all licenses assigned to this organization.' Below this, there is a section for 'Farm Subscriptions' which contains a table of licenses. The table has columns for Name, Demo, Effective Date, Expiration Date, and Device. The table lists six licenses, all with 'Demo' status 'Yes'. Below the table are three expandable sections: Desktop Software, WM-Form, and Display Link.

Name	Demo	Effective Date	Expiration Date	Device
FarmENGAGE - Operations Bundle	Yes	04/14/2025	04/29/2027 8:52 AM	
FarmENGAGE - User Bundle	Yes	04/14/2025	04/29/2027 8:52 AM	
FarmENGAGE - User Bundle	Yes	04/14/2025	04/29/2027 8:52 AM	
FarmENGAGE - User Bundle	Yes	04/14/2025	04/29/2027 8:52 AM	
FarmENGAGE - User Bundle	Yes	04/14/2025	04/29/2027 8:52 AM	
FarmENGAGE - User Bundle	Yes	04/14/2025	04/29/2027 8:52 AM	

Farm Subscriptions

FarmENGAGE organization level, user level and Display Connection licenses can be purchased from PTx Trimble dealers and will be shown under Farm Subscriptions.

See the [Feature Comparison chart](#) for details on what's included in each organization license level.

Display Connection licenses enable data transfer between FarmENGAGE and your display, supporting features such as fleet management, over-the-air sharing of resources and automatic syncing of as-applied data.

Five user licenses are included with each organization level license.

Display Link License

PTx Trimble includes a 1-year FarmENGAGE-Data license and a 1-year Display Connection license with the purchase of all new GFX displays. The FarmENGAGE-Data license is included with your Precision-IQ software unlock. Together, this bundle of an organization level license and a display connection is called a **Display Link**. This licenses your organization and enables your display for data transfer.

Display Links provide the same functionality as purchasing a FarmENGAGE organization level license and a Display Connection separately. See the [Feature Comparison chart](#) for details on what's included in each organization license level.

Display Connection licenses enable data transfer between FarmENGAGE and your display, supporting features such as fleet management, over-the-air sharing of resources and automatic syncing of as-applied data.

How to Enable the Scouting Module

Enable this module to perform scouting activities across your operation. You can create scouting records, convert them into work orders to track field activities, generate reports, and share data with third parties for analysis.

Note: An Operations license is required to access this module.

1. Click the user icon in the top-right corner of the site
2. Select Licenses
3. Click the Marketplace tab
4. Locate Scouting Reports
5. Click Add to enable the module
6. Once enabled:
 - a. Scouting records can be created and managed in FarmENGAGE mobile
 - b. Scouting Reports will be available under Analytics in the FarmENGAGE web application

