



Corporate Set Up User Guide

User Guide for Trimble Ag Software | Corporate Level

Edition 1 | August, 2020

Highlights:

- User Contacts - Grower Level
- Employee Users - Corporate Level

Corporate Set Up User guide includes instructions on how to set up Trimble Ag Software access to your employees, growers and other type of users. The guide will walk you through the different level of permissions for each type of user.

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CORPORATE ONBOARDING

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0.1

Grower Level System Contacts

Grower Level | Creating a Contact

CORPORATE ONBOARDING

The screenshot displays the Grower Level interface. On the left is a sidebar menu with options: Home, Dashboard, Profile, Farms, Equipment, Inputs & Materials, Commodities, Storage, Farm Weather, People, Documents, and Grain Contracts. The 'People' option is highlighted with a yellow arrow labeled '1.'. The main content area has tabs for PEOPLE, CONTACTS, and PARTNERSHIPS. Below the tabs, there is a toggle for 'Operator display sign in: OFF - Change'. A dropdown menu is set to 'All Contacts'. On the right, there is a 'MANAGE' button with a plus icon, highlighted with a yellow arrow labeled '2.'. Below this, a table lists contacts with columns: Name, System Access, Job Title, Groups, Operator, and Precision-IQ Access. One contact, Andrew Pinkham, is listed with a checkmark in the System Access column.

1. Navigate to this page by highlighting the Farm tab at the top of the page and select the “People” option, or selecting the peoples icon on the left sidebar
2. Select the manage icon and choose the option “Add New Contact”

Grower Level | System Access

CORPORATE ONBOARDING

PEOPLE CONTACTS PARTNERSHIPS

Contact Properties

Phone System Access Equipment Operator

Can Access System 1.

Email *

Web and Mobile 2.

Financial Access 3.

Organization Administrator 4.

Operator Manager 5.

Mobile Only

Time Tracker only

Limited web access, no mobile

Mobile Security

+ ADD PERMISSION

Resource	Year	Permission
		Full Access

1. Enter the email you want the contact to log in with
2. Check off “web and mobile” if you want them to have access through online and the mobile app
3. Check off “financial access” if you want the contact to be able to see field profitability, purchases, and other financials
4. Org Admin gives the contact the ability to invite/add new org members, and set the restrictions for other contacts as well
5. Operator Manager gives limited admin privileges. Can add or edit contacts, but cannot delete contacts

Grower Level | Mobile Restrictions

CORPORATE ONBOARDING

The screenshot shows the 'Contact Properties' page for a user named Viviane Faria. The page is divided into several sections:

- Contact Properties:** Includes fields for First Name (Viviane), Last Name (Faria), Job Title, and Email (viviane_faria@trimble.com). There is an 'UPDATE PHOTO' button.
- System Access:** A tabbed interface with 'System Access' selected. It includes a checkbox for 'Can Access System' (checked) and an 'Email' field with the value 'viviane_faria@trimble.com'.
- Mobile Access:** A section with radio buttons for 'Web and Mobile', 'Mobile Only', 'Time Tracker only', and 'Limited web access, no mobile'. The 'Mobile Only' option is selected and highlighted with a yellow arrow and the number '6.'. The 'Time Tracker only' option is also highlighted with a yellow arrow and the number '7.'. The 'Limited web access, no mobile' option is highlighted with a yellow arrow and the number '8.'.
- Mobile Security:** A table with columns 'Resource', 'Year', and 'Permission'. It lists permissions for 'Contracts', 'Field Scouting', and 'Seeding'. A '+ ADD PERMISSION' button is located at the top right of the table. A yellow arrow and the number '9.' point to the table.

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

6. Mobile Only gives the contact full mobile access, but no web access.
7. Time tracker only limits the contact to mobile access only, as well as the ability to use time tracker in the app to clock in/out
8. Limited web access, no mobile gives the contact the ability to add and see records online, but no access to financials, and zero mobile access
9. If you want the contact to have limited mobile access, you can choose to add permissions for specific features, otherwise you can leave it blank if you want them to have full mobile access

Mobile Security allows to customize the access level in different features for a mobile user. One of the values is when farmers work with contractors. In some cases a farmer may want to restrict the level of access that a contractor should have.

For instance:

- Access only data from a current year
- Not having access to financial data
- Not being able to "edit" existing data in different features

Grower Level | Operator

CORPORATE ONBOARDING

PEOPLE CONTACTS PARTNERSHIPS

Contact Properties

UPDATE PHOTO

First Name *
Last Name
Job Title
Email

Phone System Access Equipment Operator

Equipment Operator

1. → Applicator License

2. → Unit Cost /hr

Trimble Display Access ⓘ

3. → Operator display sign in: ON - Change

Sign In ID ⓘ

4. → 4 Digit PIN * ⓘ

5. → Precision-IQ Access ⓘ Full Access

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

1. If the contact has an applicator license you can add that here
2. Set the unit cost associated with this operator. If you assign a task to this operator, that unit cost will be reflected on the profitability tab in field manager
3. Trimble display access will give the operator the ability to log into a GFX and TMX using these credentials. Operator display sign in “on” will require them to log into the display, “off” will not require the operator to sign in. The sign in ID will default to the contact name.
4. Enter the 4 digit pin the operator can log into the display with.
5. **Full access** - Can use all features on display. **Select** - Can select any feature but can't edit or create.

0.2

Corporate Level Employees Set up

Corporate Level | Add Employee

CORPORATE ONBOARDING

New User

1. → Access Level: Crop Advisor (dropdown) Disable User

View Financials: Yes No

2. → Manager: (dropdown)

Name: (First) (Last)

Initials: (text)

Credentials: (text)

Title: (text)

Phone 1: (text)

Phone 2: (text)

Cell Phone: (text)

1. Once you begin setting up the new employee, you can set the access level you want them to have in the system.

- **Crop Advisors** - Access to clients that they are partnered with.
- **Managers** - Access to all clients of Crop Advisors they are set as Managers for.
- **Corporate** - Access to all clients in company.
- **Admin** - Access to all clients in company with added Admin features.

2. Select the manager of this employee from the list of managers in your company.

Corporate Level | Permissions

CORPORATE ONBOARDING

The screenshot displays a corporate onboarding form with the following fields: Postal Code, Courier Address, Lab Account #, Agri-Data Reseller Code, Licence No, GST Number, Picture (with an 'UPLOAD' button), Username, Bio, and a 'SAVE INFO' button. A 'Set Account Password' dialog box is open, containing fields for Username, Email, Password, and Confirm password, along with a checked checkbox for 'Require password reset on login' and 'Set Password' and 'Close' buttons. Yellow arrows labeled '3.' and '4.' point to the Username field and the 'Require password reset on login' checkbox, respectively.

3. Set the username for the employee. This will be the email they use to log into the software with. Here you can also set a temporary password for the employee to log in with, and then it will ask them to reset their password at login to a permanent one.
4. Leave the box checked next to “require password reset on login” if you want the employee to reset their password the first time they login.
 - If you want to set the permanent password for this employee, uncheck that box and set their permanent password on this page. Once you are done, select “set password” and then save the employee. That employee will now be able to log into the software.

Corporate Level | Permissions

CORPORATE ONBOARDING

► Bens Test Farm ► 2021 ►

Manage Permissions

Client Rep	Watkins, Ben, ▼	Update
Precision Workbench User	▼	Update

Turning on mobile access for this farm will give the user access to view, edit and delete information on this farm.

Names	Mobile Access	
Watkins, Ben	<input type="checkbox"/>	
Pinkham, Andrew	<input checked="" type="checkbox"/>	2. ←

Update

Other Permissions

Pinkham, Andrew,	>>	Baker, Siobhan, Epp, Danielle, Grime, Mitchell, Hurraw, Deb, McMillan, Kathleen, Myers, Gary, Wilson, Matt,
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1. →

1. When an employee is created in the system, they will be listed in one of these two windows under the “Other Permissions” section.

- If they are listed in the window on the **right side**, it means they **do not** currently have access to this grower organization.
- If they are listed in the window to the **left**, it means they **have been given access** to this grower organization when logging in.

You can move employees back and forth between the two options by highlighting that employee and moving them to one side or the other.

2. When the employee has been added to the window on the left side giving them access to the grower organization, their name will appear under the “mobile access” section with a checkbox next to it. If you check off the box next to their name and select “update” then the employee will be able to access the grower organization through the mobile app. If you only want them to have access to the org online, then leave the checkbox blank.