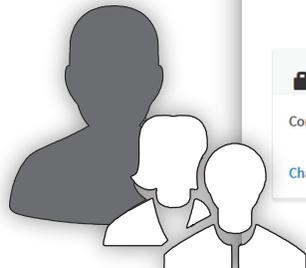




# Giving account owners more control.



One account for all things AgSync

AgSync Account gives you quick access to settings and tools that let you safeguard your data, protect your privacy, and decide how your information can make AgSync services work better for you.

**Security Settings** >

Control your password and account-access settings.

[Change your password](#)

**Organization Settings** >

Manage settings for the organization that you belong to.

[Organization Information](#)

[Users \(preview\)](#)

[Locations \(preview\)](#)

## NEW Account Owner Permissions



### CREATE NEW USERS / EDIT USERS

- create new users within your organization.
- edit users in organization.



### CHANGE USER PASSWORD



### UPDATE USER PERMISSIONS

- change what the user can and cannot do within AgSync.



### ADD / REMOVE PROFILE ACCESS (LOCATIONS)

- decide which locations are available to a user.



### ENABLE OR DISABLE USERNAME

- ability to check on and off whether a user can log in.

### Organization Users

Users [ADD USER](#)

Username	Name	Account	
bensisko@agsync.com	Ben Sisko	Breen Industries	<a href="#">EDIT</a>
chrspiike@agsync.com	Chris Pike	Breen Industries	<a href="#">EDIT</a>

**JimKir** | [User Information](#) | [Permissions](#)

**wedge** | [User Information](#) | [Permissions](#)

**User Type**

**Orderer**

- Set up and edit customer, farms and fields.
- Create and save boundaries.
- View fields on map.
- Create orders in AgSync and AgriSite app.
- View and filter orders.
- Print work orders, field maps, & other reports.

(if enabled)

**Dispatcher / Bookkeeper**

- Set up and edit customer, farms and fields.
- Create and save boundaries.
- View fields on map.
- Create orders in AgSync and AgriSite app.
- Print work orders, use reports, & other reports.
- Schedule and dispatch orders to personnel.
- Complete orders.

**Additional Permissions**

**Admin**

Account Settings tab is enabled in Ag

- Manage Account Information.
- Manage Certifications.
- Manage Personnel & Equipme
- Manage Request New Operato
- Manage Staging Locations.
- Manage Layer Configuration.
- Manage Report Settings.
- Manage Completion Requirem
- Manage Product List.
- Manage Request New Product
- Manage Carrier Rates.
- Manage Pest List.
- Manage Crop List.
- Manage Alerts.
- Manage Operations.
- Manage Approvals.

# AgSync Account Owner Quick Start Guide

Create a User / Edit a User.

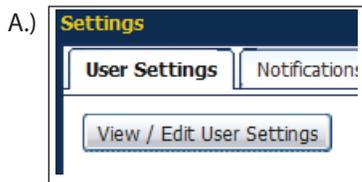


One account for all things AgSync

## 1 VIEW USERS

A.) Click Settings in AgSync, then View/Edit User Settings to access Organization Users.

B.) On the users page you can see all users under the Organization. The user section lists the Username, the users Full Name and the Account the user has as a home account.



## 2 ADD USER

Click the ADD USER button. In the User Information Tab, choose the Users Home location, Name and email address. The email address will be used as the username for the user. Choose a temporary password for the user. The user will need to update password upon first login.



**User Information**  
Name, email, and password

User Information

Home Location  
Test Applicator

Full Name  
Full Name  
Full name is required

Email address  
Email  
Email is required

Password  
••••••••

## 3 ADD USER PERMISSIONS

Choose a User Type for the new user and add any additional permissions if needed. To choose a permission, just click the name and the area will highlight in blue indicating it is chosen. Click Next If you need a user that has both Dispatch AND Operator permissions, see the full user guide page pg. 4. for details.

**Permissions**  
User type and roles

PREVIOUS NEXT

User Type

**Orderer**

- Set up and edit customer, farms and fields.
- Create and save boundaries.
- View fields on map.
- Create orders in AgSync and AgriSite app.
- View and filter orders.
- Print work orders, field maps, & other reports.

(if enabled)

**Dispatcher / Bookkeeper**

- Set up and edit customer, farms and fields.
- Create and save boundaries.
- View fields on map.
- Create orders in AgSync and AgriSite app.
- Print work orders, use reports, & other reports.
- Schedule and dispatch orders to personnel.
- Complete orders.
- Apply as applied data and publish.

**Operator**

- Log into Operator PRO app.
- View orders.
- Navigate to fields.
- Edit products on orders.\*
- Re-assign orders.\*
- Start application.
- Enter completion data.

## 4 ADD USER LOCATIONS

Adding additional locations here will give this user profile access to the accounts you add. The system will add the home account by default, you only need to add additional locations if needed. Click Save. The new user is created and an email verification will be sent to the user. You will need to give the new user their password before they can verify their username.

**Locations**  
Location access

PREVIOUS

Locations

Select a location...

**Account Name**  
Test Applicator

PREVIOUS SAVE

## \* EDIT CURRENT USER

To edit an existing user click the Edit user icon next to the username. (pencil icon) Then depending on the changes follow steps 2,3 or 4.



## Account Owner Functions

Manage Account Users

Create / Edit User

Change Passwords / Send Verification

Add Location (Profile Access) to User

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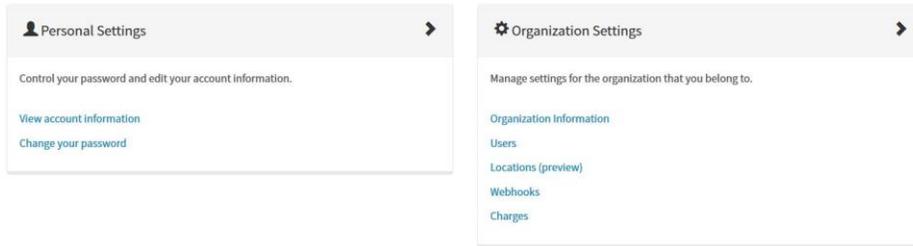
# SETTINGS

AgSync Account gives you quick access to settings and tools that let you safeguard your data, protect your privacy, and decide how your information can make AgSync services work better for you. Access Personal and Organization Settings.



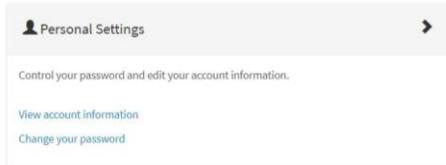
## One account for all things AgSync

AgSync Account gives you quick access to settings and tools that let you safeguard your data, protect your privacy, and decide how your information can make AgSync services work better for you.



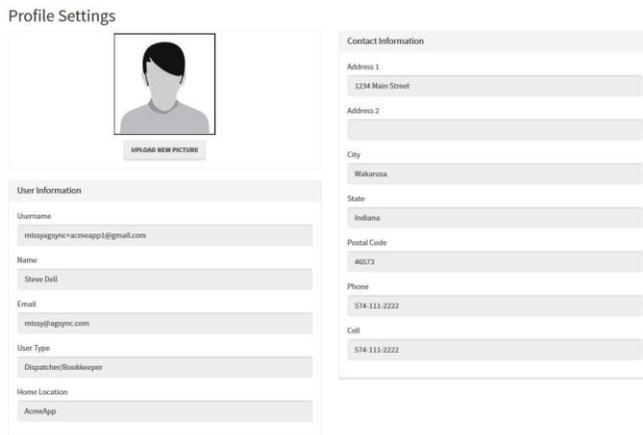
# PERSONAL SETTINGS

All users have access to their own personal information. View your own account information for your username.



# View Account Information

## Upload User Image



Users can upload an image for their own personal account. This image will be attached to the username. Recommended image size is 180x180. You can upload png, tif, jpg images. Click Upload New Picture, browse for image and choose Open. The image will be uploaded and upon a refresh will re-size to appropriate size.

## Preview User Information

The Profile Settings page will allow users to preview all user personal information such as username, name, email, user type, and contact information. This information is **view only** on this page. Account Owners can edit this information under ‘Users’ section.

## Password

### Change Your Password

Click ‘change your password’ to be taken to the Change Password section. Here you will need to enter current password, and a new password. If you do not know the current password you can choose the Forgot Password on the login page in AgSync.

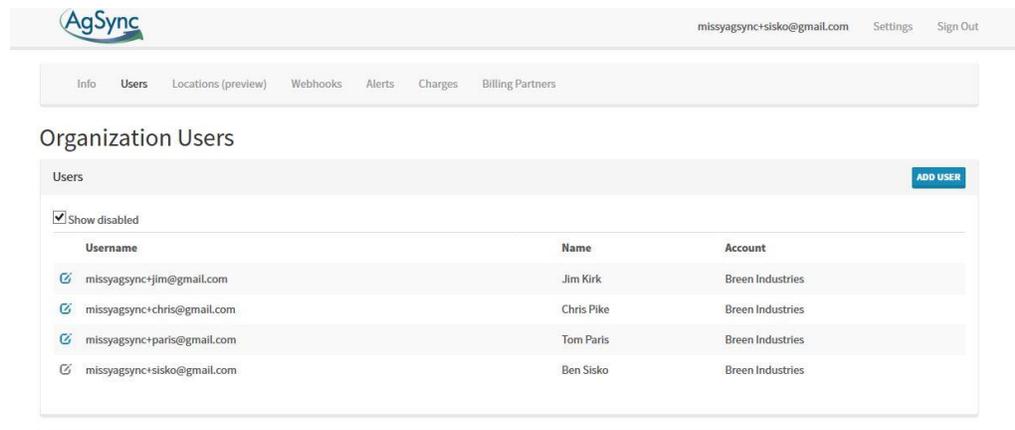
## ORGANIZATION SETTINGS

### Users

This page loads all users under the organization. Only Account Owners have access to this page.

### View All Users

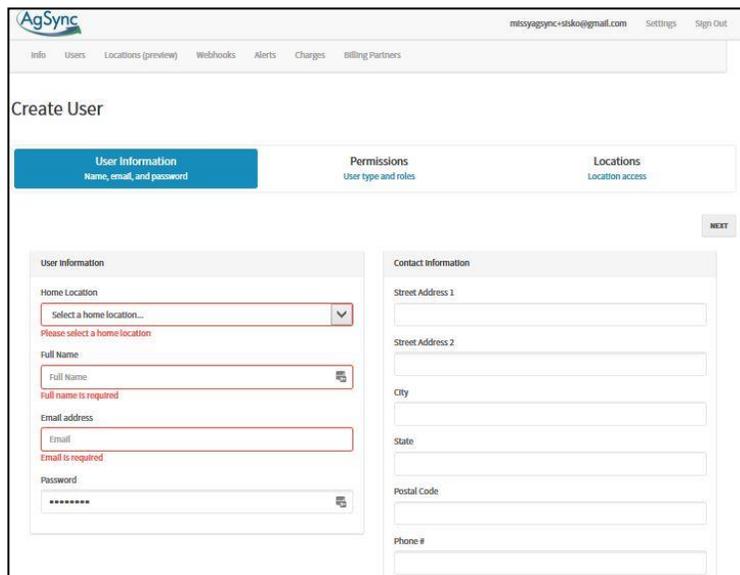
In the users page you can see all users under the Organization. The user section lists the Username, the users Full Name and the Account the user has as a home account.



The screenshot shows the 'Organization Users' page in AgSync. At the top, there is a navigation bar with the AgSync logo, the user's email (missyagsync+sisko@gmail.com), and links for Settings and Sign Out. Below the navigation bar, there is a menu with options: Info, Users (selected), Locations (preview), Webhooks, Alerts, Charges, and Billing Partners. The main content area is titled 'Organization Users' and features a table of users. A blue 'ADD USER' button is located in the top right corner of the table. A checkbox labeled 'Show disabled' is checked. The table has three columns: Username, Name, and Account. The data in the table is as follows:

Username	Name	Account
<a href="#">missyagsync+jim@gmail.com</a>	Jim Kirk	Breen Industries
<a href="#">missyagsync+chris@gmail.com</a>	Chris Pike	Breen Industries
<a href="#">missyagsync+paris@gmail.com</a>	Tom Paris	Breen Industries
<a href="#">missyagsync+sisko@gmail.com</a>	Ben Sisko	Breen Industries

## Add New Personnel



The screenshot shows the 'Create User' form in AgSync. The form is divided into three tabs: 'User Information' (selected), 'Permissions', and 'Locations'. The 'User Information' tab contains the following fields:

- Home Location: A dropdown menu with the text 'Select a home location...' and a red error message 'Please select a home location'.
- Full Name: A text input field with a red error message 'Full name is required'.
- Email address: A text input field with a red error message 'Email is required'.
- Password: A text input field with a red error message 'Password is required'.
- Contact information fields: Street Address 1, Street Address 2, City, State, Postal Code, and Phone #.

There is a new way to add and make personnel users. Make the user on the user page, NOT on the personnel and equipment tab. By creating the personnel on the Account Owner user page, you not only create the personnel to assign work to but it also creates the username. No need to contact AgSync support.

On the user page, click the Add User Button. This will open the new user page.

In the User Information Tab,

Choose the Users Home location, Name and email address. The email address will be used as the username for the user. Choose a temporary password for the user. The user will need to update password upon first login.

Click Next Add the Permission of Operator. Upon Save the personnel will be created in the personnel and equipment tab AND will be created as a user login. Now you can now give your user their login information.

## Add New User

The screenshot shows the 'Create User' form in the AgSync application. The 'User Information' tab is active, showing fields for Home Location (a dropdown menu), Full Name, Email address, Password, Contact Information (Street Address 1, Street Address 2, City, State, Postal Code, Phone #), and a 'NEXT' button.

On the user page, click the Add User Button. This will open the new user page.

In the User Information Tab, Choose the Users Home location, Name and email address. The email address will be used as the username for the user. Choose a temporary password for the user. The user will need to update password upon first login.

Click Next

## Add User Permissions

The screenshot shows the 'Create User' form in the AgSync application, with the 'Permissions' tab active. It displays a list of user types: Orderer, Dispatcher / Bookkeeper, Operator, Tender, Admin, Agronomist, and Scout. The 'Admin' and 'Agronomist' tabs are highlighted in blue, indicating they are selected.

Choose a User Type for the new user and add any additional permissions if needed. To choose a permission, just click the name and the area will highlight in blue indicating it is chosen. Click Next

**If you need a user that has both Dispatch AND Operator permissions, then create the user with ONLY Operator permissions.** This will create the user and also create the personnel in the account settings tab inside AgSync. After this operator user is saved THEN contact support at AgSync to add the Dispatch permissions.

## Add Additional Locations to New User

The screenshot shows the 'Create User' form with the 'Locations' tab selected. The form has three tabs: 'User Information' (Name, email, and password), 'Permissions' (User type and roles), and 'Locations' (Location access). Below the tabs, there are 'PREVIOUS' and 'SAVE' buttons. The 'Locations' section contains a dropdown menu labeled 'Select a location...' with a plus icon to add more locations, and an 'Account Name' field.

Adding additional locations here will give this user profile access to the accounts you add. The system will add the home account by default, you only need to add additional locations if needed.

Click **Save**. The new user is created and an email verification will be sent to the user. **You will need to give the new user their password before they can verify their username.**

## Edit Existing User

To edit existing user, click the edit icon next to username. This will open the Edit User Information window.

The first screenshot shows the 'Organization Users' list. The first user, 'missyagsync+jim@gmail.com', has an edit icon circled in red. The second screenshot shows the 'Edit User' form for this user. The form has three tabs: 'User Information' (Name, email, and password), 'Permissions' (User type and roles), and 'Locations' (Location access). The 'User Information' tab is active, showing fields for 'Home Location' (Breen Industries), 'Full Name' (Jim Kirk), and 'Email address' (missyagsync+jim@gmail.com). The 'Contact Information' section includes fields for 'Street Address 1', 'Street Address 2', 'City', 'State', 'Postal Code', 'Phone #', and 'Cell Phone #'. A red error message 'Cell phone is required' is visible below the 'Cell Phone #' field. There are 'RESET PASSWORD' and 'NEXT' buttons.

## Change User Password

Account owners can change user passwords by clicking the Reset Password button. Enter the new password, confirm it, and then choose Change Password. The password will be updated for the user.

## Change User Information

Click the icon next to the username to open the Edit user window. Update users Full Name and address and phone information. To change username, please contact AgSync support for assistance.

## Change User Home Account

Click the icon next to the username to open the Edit user window. Update the user's home account by choosing a different account from the drop down. Click SAVE *under the locations tab* to save edits.

## Change User Permissions

Click the icon next to the username to open the Edit user window. Click the Permissions Tab to open permission feature. Update the permissions by choosing a different type. Click SAVE *under the locations tab* to save edits.

**Important Note:** Adding the Operator, Tender, Agronomist or Scout permission will result in additional charges to your AgSync account. If you remove any of these permission and add it to the same user later in same contract year, there will be another charge created in your account for the re-addition. This does not affect 'unlimited' Operator user accounts.

## Change User Locations (Profile Access)

Click the icon next to the username to open the Edit user window.

Click the Locations tab to edit locations. Update the locations the user will have access to, click the Plus sign next to the dropdown to add to the list. Keep adding until finished and then

click SAVE to save edits.

## Adding Operator Permissions to an already existing user

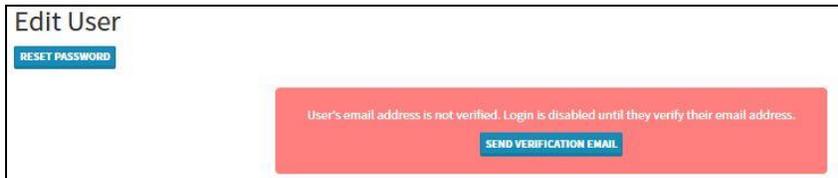
To add Operator Pro app permissions to a user that already exists, please add the user in the Account Settings under Personnel and Equipment then request new Operator and AgSync Support will add those permissions to the user. Warning: clicking the operator permission on the Organization User settings will corrupt the current users settings.

## Un-Verified Users

Users which have not verified their username via a link in their email verification, will show up in the user list with a unverified icon next to their name. ⚠️

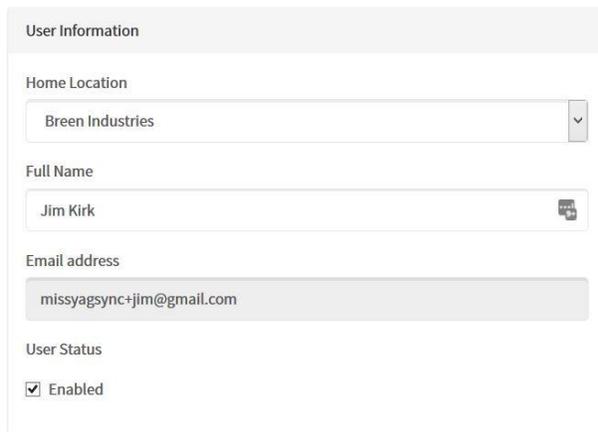
### Send Verification Email (to unverified users)

Account owners can resend the verification email to un-verified users. Edit user then Click the Send Verification Email.



## Disable User

To disable a current user, navigate to the user page and click the edit user icon to bring up the data for that particular user. Scroll to the bottom of the first column and uncheck the 'Enabled' box. Upon saving this user will not be able to log in.

The image shows a screenshot of a "User Information" form. It contains the following fields: "Home Location" with a dropdown menu showing "Breen Industries"; "Full Name" with a text input field containing "Jim Kirk" and a small icon; "Email address" with a text input field containing "missyagsync+jim@gmail.com"; and "User Status" with a checked checkbox labeled "Enabled".