



DEEP ROOT SOFTWARE

Crews and Routes

A guide to field crews, daily schedules, and route planning

WEB DASHBOARD TUTORIAL



Open Crews & Routes

Use the sidebar to manage crews, assignments, schedules, and route order.

1

The screenshot shows the Deep Root Software interface. On the left is a dark sidebar with various menu items. The 'Crews & Routes' item is highlighted with a red circle. The main content area is titled 'Crews' and shows a 'Schedule Date' selector set to '10 / 11 / 2026'. Below this, there are tabs for 'Mowing', 'Spring', 'Summer', 'Fall', 'Fertilizing', 'Spraying', 'Irrigation', and 'Plants'. The 'Mowing' tab is selected. A message states: 'No saved schedule exists yet for 2026-10-11. Copy the full default layout, copy the previous full-day schedule, start blank, or drag customers into crews.' Below this, there are sections for 'Master Pool', 'Employees' (listing Jane Worker, Owner, and Sam Supervisor), and 'Customers'.

2 Start here

- Open Crews & Routes from the sidebar.
- The page opens on today's schedule.
- Use the date selector to view another day.

3

This screenshot is a close-up of the 'Schedule Date' section. It shows a calendar for October 2026. The date '10 / 11 / 2026' is selected. A red circle highlights the 'View' button next to the date selector. The 'Add Crew' section is also visible on the right.

4 View a schedule

- Choose a date from the calendar.
- Select View to load that day.
- Existing crews and assignments appear for the selected date.



Create and manage a crew

Add a crew for the selected schedule date.

1

Add Crew

Tutorial Crew

Add Crew

2

Tutorial Crew

Scheduled date layout.

Delete

Tutorial Crew

Rename

Employees — 0

No employees assigned.

Customers — 0

Drag customers to create a custom app order.

Sort Order

No customers assigned.

3

Add a crew

- Enter a clear crew name.
- Select Add Crew.
- A new crew card appears in the schedule.

4

Manage the crew card

- Rename the crew when needed.
- Delete removes the crew after confirmation.
- Removing a crew does not delete employees or customers.



Assign employees and customers

Drag cards from the Master Pool into the appropriate crew.

1

Select multiple cards by clicking or dragging across them. Drag one selected card into a crew to move all selected cards of that same type.

▼ Master Pool

☐ Show completed Mowing customers in master pool
☐ Show all Mowing properties

The Mowing master pool shows properties with a matching next mowing date or recurring schedule for the selected day.

Employees — 3

Jane Worker Active
worker

Owner Active
owner

Sam Supervisor Active
supervisor

Customers — 0

Sort Order ▼

No customers assigned.

✓ Tutorial Crew
Scheduled date layout.

Delete

Rename

Tutorial Crew

Employees — 0

No employees assigned.

Customers — 0

Sort Order ▼

No customers assigned.

2 Employees

- Drag one employee card onto a crew.
- Select multiple cards before dragging to move several employees together.
- Employees may be assigned to more than one crew.

3 Customers

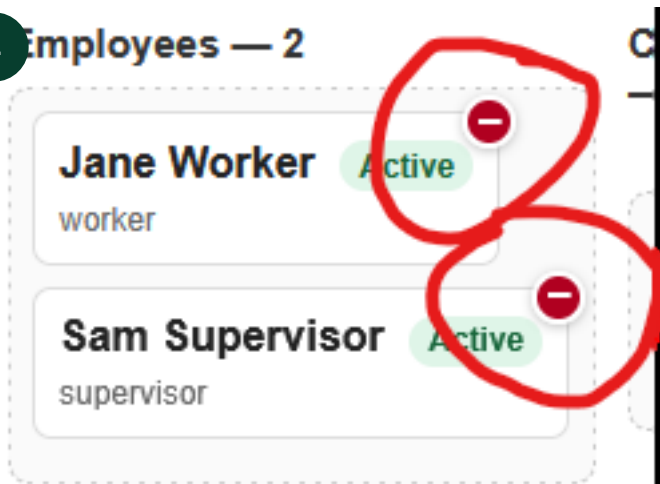
- Choose the service type above the Master Pool.
- Only eligible customers for that service appear.
- Drag one or several customer cards onto the crew.



Review crew membership

Crew members and assigned services appear on each crew card.

1 Employees — 2



2 What employees see

- Crew assignments appear in the Deep Root Crews app.
- Customer service type and instructions travel with the assignment.
- An administrator can be added to crews when app visibility is needed.

3 Remove an assignment

- Select the red remove control on an employee or customer card.
- Removing a card from the crew does not delete the underlying employee, customer, or service record.
- Review the crew before moving to the next schedule date.



Build a default crew layout

A default layout provides a reusable starting point for future dates.

1 Schedule Date

10 / 11 / 2026



View

Use Edit Default Layout to change the reusable crew template.

Edit Default Layout

Copy Full Default

Copy Previous Day

Start Blank

2

You are editing: **Default Layout**

3 Create the reusable layout

- Select Edit Default Layout under Schedule Date.
- Add, remove, or rearrange employee and customer cards in the default layout.
- The banner confirms when you are editing the Default Layout.

Save the default arrangement before returning to a dated schedule.

Copy a layout to another date

Use copy controls to avoid rebuilding recurring crews by hand.

1

Schedule Date

10 / 12 / 2026



View

Use Edit Default Layout to change the reusable crew template.

Edit Default Layout

Copy Full Default

Copy Previous Day

Start Blank

2

Schedule Date

10 / 12 / 2026



View

Use Edit Default Layout to change the reusable crew template.

Edit Default Layout

Copy Full Default

Copy Previous Day

Start Blank

3

Copy the default

- Choose the target date and select View.
- Select Copy Full Default to populate the dated schedule.
- Adjust that day without changing the reusable template.

4

Copy the previous day

- Open the new date.
- Select Copy Previous Day when unfinished or repeated work should carry forward.
- Review assignments before crews begin work.



Review visibility and route order

Use the Master Pool options and Crew Setup / Route Map toggle.

1

2

tabs; tabs only

3

Completed customers

- Show completed customers only for quick reference or reassignment.
- Completed work added to a crew does not reappear in the mobile app as active work.

4

Route Map

- Switch from Crew Setup to Route Map.
- Customer sort order controls route order in the map and crew app.
- Return to Crew Setup to change assignments.



Crew schedule complete

Your crews are ready with employees, customer work, and route order.

THANK YOU FOR CHOOSING DEEP ROOT

Questions or suggestions? Visit [Help](#) in the Deep Root sidebar.