



DEEP ROOT SOFTWARE

Add and Edit Customers

A step-by-step guide for building and maintaining your customer list

WEB DASHBOARD TUTORIAL



Start on the Customers page

Use Customers in the left sidebar to open customer management.

1

Deep Root Software Customers

WORKSPACE

- Dashboard
- Customers
- Customer Email
- Employees
- Time Log
- Crews & Routes
- Invoicing
- Financial Reports
- Materials & Inventory
- Payroll
- Chemical Reports
- Company Information

RESOURCES

- Help
- Terms
- Privacy Policy

Demo Company: You are viewing a read-only demo. You can navigate, search, sort, and expand sections, but changes are disabled. [Create your own company](#)

Add Customer

Address City State ZIP Code

Name Email Email 2 Sort Order

☐ Auto Emails ☐ Mowing ☐ Spring Cleanup ☐ Summer Cleanup ☐ Fall Cleanup
☐ Fertilizing ☐ Spraying ☐ Irrigation ☐ Plants ☐ Active Job

[Add Customer](#) [Mass Import](#) [Mass Email](#) [Download CSV Template](#) [Download XLSX Template](#)

If this number already exists, only the contiguous occupied block starting at this number will shift. Existing gaps are preserved.

Customers

Search customers...

4 of 4 customers

Sort Order	Address	Name	Emails	Mowing	Spring	Summer	Fall	Fertilizing	Spraying	Irrigation	Plants	Job	Actions
0	25 12th Street Avon, NJ 08202	Joe Dalton	joe@dalton.com Auto Email: No	Weekly	Yes	Yes	Yes	Yes	Yes	No	No	No	Edit Delete
1	134 84th Stone Harbor, NJ 08247	Christina Thomas	christina@thomas.com Auto Email: No	Weekly	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Edit Delete
2	3289 First Ave Avon, NJ 08202	David Harrison	david@harrison.com Auto Email: Yes	Weekly	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Edit Delete
3	27 84th Stone Harbor, NJ 08247	Samantha Robinson	samantha@robinson.com Auto Email: Yes	Weekly	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Edit Delete

1 What you can do here

- Add one customer at a time.
- Import many customers from a CSV or XLSX template.
- Search, review, and edit existing customer records.

Tip: Complete addresses and emails help routing.



Enter the customer details

The Add Customer form appears at the top of the Customers page.

1

Address
25 12th Street

City
Avalon

State
NJ

ZIP Code
08202

Name
Joe Dalton

Email
joe@dalton.com

Email 2

Sort Order
0

Moving this customer will shift the affected customers automatically.

Customer Status and Preferences

☒ Active ☐ Auto Emails

2

Required and recommended details

- Enter the customer name and complete service address.
- Add the primary email address; use Email 2 when needed.
- Use Sort Order to control the customer sequence in route lists.

3

How sort order behaves

- New customers default to the end of the list.
- You may reuse an existing position.
- Deep Root shifts later customers automatically to prevent duplicate positions.



Choose services and email preferences

Select only the services that apply now; you can change them later.

1 Customer Status and Preferences

☒ Active

☐ Auto Emails

Services

☒ Mowing

☐ Create invoice after approval

Price per completed service

☒ Taxable

No instruction.

Add Instruction

☒ Spring Cleanup

☐ Create invoice after approval

Price per completed service

☒ Taxable

No instruction.

Add Instruction

☒ Summer Cleanup

☐ Create invoice after approval

Price per completed service

☒ Taxable

No instruction.

Add Instruction

☒ Fall Cleanup

☐ Create invoice after approval

Price per completed service

☒ Taxable

No instruction.

Add Instruction

☒ Fertilizing

☐ Create invoice after approval

Price per completed service

☒ Taxable

No instruction.

Add Instruction

☒ Spraying

☐ Create invoice after approval

Price per completed service

☒ Taxable

No instruction.

Add Instruction

☐ Irrigation

☐ Create invoice after approval

Price per completed service

☒ Taxable

No instruction.

Add Instruction

☐ Plants

☐ Create invoice after approval

Price per completed service

☒ Taxable

No instruction.

Add Instruction

☐ Active Job

☐ Create invoice after approval

Price per completed service

☒ Taxable

No instruction.

Add Instruction

2 Set up services

- Check each applicable service.
- Enter the per-completion price.
- Set taxable status and add instructions.

3 Save the customer

- Set mowing frequency, start date, and default crew.
- Select Save Customer.

Auto Emails sends approved completion notices.



Prepare a customer import file

Templates protect the column structure Deep Root expects.

1

Customer

Address City State ZIP Code

Name Email Email 2 Sort Order

☒ Auto Emails ☐ Mowing ☐ Spring Cleanup
☐ Fertilizing ☐ Spraying ☐ Irrigation
☐ Summer Cleanup ☐ Fall Cleanup
☐ Plants ☐ Active Job

Add Customer Mass Import Download CSV Template Download XLSX Template

2

deeprootsoftware.com/customers.php

Add Customer

Address City State

Name Email Email 2

☒ Auto Emails ☐ Mowing ☐ Spring Cleanup
☐ Fertilizing ☐ Spraying ☐ Irrigation
☐ Plants ☐ Active Job

Add Customer Mass Import Download CSV Template Download XLSX Template

3

Mass Import Template

name	address	city	state	zip	email	email_2	email_opt_in	active	sort_order	weekly_mowing	mowing_frequency_type	mowing_interval
John Smith	123 Main St	Avalon	NJ	08002	customer@example.com	mling@example.com	yes	yes		yes	weekly	
Mary Jones	456 Ocean Dr	Wildwood Crest	NJ	08060	mary@example.com						interval_day	

4 Prepare the spreadsheet

- Download either the CSV or XLSX template. XLSX is usually easiest for Excel or Google Sheets.
- Keep the header row and replace the example customer data with your own.
- For yes/no fields, use Yes/No, Y/N, or 1/0. Preserve ZIP codes that begin with zero.



Upload and import customers

Save the completed template before returning to Deep Root.

1

Add Customer

Address	City	State	ZIP Code
971		NJ	08001
Name	Email	Email 2	Sort Order
			2

If this number already exists, only the contiguous occupied block starting at this number will shift. Existing gaps are preserved.

☒ Auto Emails
☐ Fertilizing

☐ Mowing
☐ Spraying

☐ Spring Cleanup
☐ Irrigation

☐ Summer Cleanup
☐ Plants

☐ Fall Cleanup
☐ Active Job

Add CustomerMass ImportDownload CSV TemplateDownload XLSX Template

2

Browse... Mass Import Template.xlsx

Import Customers

3

Import the completed file

- Select Mass Import from the Customers page.
- Choose Browse and select the completed CSV or XLSX file.
- Select Import Customers, then review the customer list for accuracy.

If an import stops, correct the row identified by the error and upload the file again.



Update an existing customer

Select Edit on the customer row to open the full customer record.

1

The screenshot shows the 'Add Customer' form with fields for Address, City, State, ZIP Code, Name, Email, Email 2, and Sort Order. Below the form is a table of existing customers with columns for Name, Email, Mowing, Spring Cleanup, Summer Cleanup, and Fall Cleanup. The table lists three customers: Joe Dalton, Christine Thomas, and David Harrison.

2

The screenshot shows the 'Update Customer' form with fields for Address, City, State, ZIP Code, Name, Email, Email 2, and Sort Order. Below the form is a section for 'Customer Status and Preferences' with checkboxes for 'Active' and 'Auto Emails'.

Personal details

Update the address, email, status, and other customer information.

3

The screenshot shows the 'Customer Status and Preferences' form with a section for 'Services' containing checkboxes for Mowing, Spring Cleanup, Summer Cleanup, Fall Cleanup, Fertilizing, and Spraying. Each service has a 'Price per completed service' field and a 'To doable' checkbox. Below the services section is a 'Mowing Frequency' section with a 'Frequency' dropdown and a 'Schedule Start Date' field. The 'Default Crew' section has a 'Select crew' dropdown.

Services and instructions

Manage active services, pricing, invoicing options, and employee notes.



Set frequency and crew assignment

Configure recurring mowing and routing details on the customer record.

1

Mowing Frequency

Frequency

Weekly

Schedule Start Date

mm / dd / yyyy

The first mowing date. Weekly repeats every 7 days; Every # Days repeats by that interval.

Default Crew

Select crew

Select both a start date and crew to add mowing to future crew schedules.

Save Customer

2

Mowing frequency

- Weekly returns the customer to the mowing list seven days after completion.
- Every # Days lets you choose a custom service interval.
- Schedule Start Date anchors the recurring interval.

3

Crew and final review

- Default Crew controls where the property appears after crews are configured.
- Save the customer record after making changes.
- Confirm the address, active services, email preference, and crew assignment.

Need help? Open Help in the Deep Root sidebar.



Customer setup complete

Your customer is ready for service scheduling, routing, and communication.

THANK YOU FOR CHOOSING DEEP ROOT

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