



DEEP ROOT SOFTWARE

Add and Edit Employees

A guide to employee access, imports, editing, and time logs

WEB DASHBOARD TUTORIAL



Start on the Employees page

Open Employees from the left sidebar to manage staff accounts.

1

Deep Root Software Employees

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](#)

Subscription Employee Limit

Current plan: **No plan linked** — No employee limit configured
Active non-owner employees: 4. The owner account is excluded from employee limits.

Add Employee

Name Email Password Role

☐ Active ☐ Include in Weekly Hours Email

[Add Employee](#) [Mass Import](#) [Download CSV Template](#) [Download XL SX Template](#)

Employees

4 of 4 employees

Name	Email	Role	Active	Clocked In	Weekly Email	Actions
John Smith	john@smith.com	Supervisor	Active	No	No	Edit Delete
Jane Doe	jane@doe.com	Worker	Active	No	No	Edit Delete
Clark Adams	clark@adams.com	Worker	Active	No	Yes	Edit Delete
Steve Graham	steve@grahm.com	Worker	Active	No	Yes	Edit Delete

Role Descriptions

Worker
Can use the mobile app to complete assigned work, mark properties pending when supervisor approval is required, and add property notes that are emailed to designated note recipients.

Supervisor
Can do everything a worker can do, plus approve pending service completions in the app.

Admin
Can do everything a supervisor can do, plus log into the website dashboard to manage customers, employees, crews, time logs, company settings, and service email settings.

Owner
Can do everything an admin can do. There can be only one owner. This employee is excluded from the employee count cost.

1

Use this page to

- Add employees individually or by import.
- Search and edit employee records.
- Review roles, active status, clock status, and weekly-email settings.



Enter the employee details

Create one employee account at a time from the Add Employee card.

1

Add Employee

Name

Email

Password

Role

Worker ▼

☒ Active ☒ Include in Weekly Hours Email

Add Employee

Mass Import

Download CSV Template

Download XL SX Template

2

Account information

- Enter the employee name and a unique email address.
- Create a temporary password and have the employee change it later.
- Keep Active checked when the employee should be able to sign in.

3

Email and role settings

- Choose Worker, Supervisor, Admin, or Owner.
- Include in Weekly Hours Email adds this employee to the weekly summary.
- Select Add Employee to save the account.



Choose the correct role

Roles determine what an employee can do in the mobile app and website.

1

Role Descriptions

Worker

Can use the mobile app to complete assigned work, mark properties pending when supervisor approval is required, and add property notes that are emailed to designated note recipients.

Supervisor

Can do everything a worker can do, plus approve pending service completions in the app.

Admin

Can do everything a supervisor can do, plus log into the website dashboard to manage customers, employees, crews, time logs, company settings, and service email settings.

Owner

Can do everything an admin can do. There can be only one owner. This employee is excluded from the employee count cost.

2

Role summary

- Worker: completes assigned work, marks properties pending, and adds notes.
- Supervisor: worker access plus approval of pending service completions.
- Admin: supervisor access plus authorized website dashboard management.
- Owner: full administrator access; only one owner is permitted.

Use the least-permissive role that still lets the employee do their job.



Import several employees

Use a Deep Root template so every column is mapped correctly.

1 Employee

Name Email Password Role

☐ Active ☐ Include in Weekly Hours Email

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

2

Mass Import Employees

Upload a CSV or XLSX file. Blank optional fields use the defaults shown in the templates.

Required columns:

name,email,password,role

Optional columns:

active,include_in_weekly_email

Boolean fields accept yes/no, 1/0, true/false, y/n, or on/off. Both optional fields default to yes.

[Download CSV Template](#)

[Download XLSX Template](#)

[Browse...](#) No file selected.

[Import Employees](#)

3 Complete the import

- Download the CSV or XLSX template; XLSX is usually easiest in Excel or Google Sheets.
- Keep the header row and enter one employee per row.
- Select Mass Import, browse to the completed file, and select Import Employees.

For yes/no fields, the importer accepts Yes/No, Y/N, or 1/0.



Review and edit employees

Saved employees appear in a searchable list beneath the add form.

1

Employees

Search employees...

4 of 4 employees

Name	Email	Role	Active	Clocked In	Weekly Email	Actions
John Smith	john@smith.com	Supervisor	Active	No	No	<button>Edit</button> <button>Delete</button>
Jane Doe	jane@doe.com	Worker	Active	No	No	<button>Edit</button> <button>Delete</button>
Clark Adams	clark@adams.com	Worker	Active	No	Yes	<button>Edit</button> <button>Delete</button>
Steve Graham	steve@grahm.com	Worker	Active	No	Yes	<button>Edit</button> <button>Delete</button>

2 Review the list

- Confirm the employee email, assigned role, and active status.
- Clocked In shows whether an employee currently has an open time entry.
- Weekly Email shows who is included in weekly-hour summaries.

3 Available actions

- Select Edit to update employee information.
- Use Delete only when the employee record is no longer needed.
- Deactivate an employee when access should stop but the record should remain.



Update an employee

Open Edit from the employee list to change account settings.

1

Name

Email

New Password

Role

☒ Active ☐ Clocked In ☐ Include in Weekly Hours Email

Save Employee

2

Editing tips

- Leave New Password blank to keep the current password.
- Change role and weekly-email settings as needed.
- Select Save Employee when finished.

3

Important

- Active controls whether the employee can use the account.
- Clocked In reflects current time-clock state; change it only when correcting an employee record.
- Role changes take effect the next time permissions are checked.



Open employee time logs

Use Time Log in the sidebar to review clock activity and totals.

1

Deep Root Software
Time Log

WORKSPACE

Dashboard

Customers

Employees

Time Log

Crews & Routes

Invoicing

Materials & Inventory

Payroll Worksheets

Chemical Reports

Company Information

Time Log

Send Hours

Total records
1

Open clock-ins
0

Completed logged time
0h 00m

Add Time Log

Employee

Choose employee

Clock In

mm / dd / yyyy , -- : -- --

Clock Out

mm / dd / yyyy , -- : -- --

Add Log

All Time Logs

1 of 1 log

Search employee, email, date, or status...

Employee	Status	Duration	Clock In	Clock Out	Delete
Sam Supervisor sam@example.com	Closed	0h 00m	Sam Supervisor	10 / 11 / 2026 , 03 : 37 PM	10 / 11 / 2026 , 03 : 37 PM

Save

Delete

2

What appears here

- Current clock status and total time.
- An Add Time Log form for missed punches.
- Existing entries with clock-in and clock-out times.

3

Administrator actions

- Add a missing entry.
- Correct an inaccurate time.
- Delete an entry when necessary.

Review corrections carefully before payroll worksheets are prepared.

Deep Root Software | Add and Edit Employees

Page 8



Correct entries and send summaries

Time-log changes should reflect the employee's actual work time.

1 Time Log

Employee

Jane Worker

Clock In

10/12/2026, 09:00 AM

Clock Out

10/12/2026, 05:00 PM

Add Log

Leave blank for currently clocked in.

2

The screenshot shows the 'Time Log' interface. At the top, there are three summary boxes: 'Total records: 1', 'Open clock-ins: 0', and 'Completed logged time: 0h 00m'. Below these is the 'Add Time Log' section, which includes a dropdown for 'Employee' (Jane Worker), 'Clock In' (10/12/2026, 09:00 AM), and 'Clock Out' (10/12/2026, 05:00 PM) fields, with an 'Add Log' button. At the bottom is the 'All Time Logs' section, which has a search bar and a table with columns: Employee, Status, Duration, Clock In, Clock Out, and Delete. The table contains one entry for 'Sam Supervisor' with a status of 'Closed' and a duration of '0h 00m'. A red circle highlights the 'Send Hours' button in the top right corner of the interface.

3 Finish the review

- Enter or correct clock-in and clock-out values, then save.
- Delete an incorrect entry only when it should not exist.
- Use Send Now to send or resend the weekly-hours email.

Weekly recipients are set in Company Information.



Employee setup complete

Your team is ready for mobile access, time tracking, and assigned work.

THANK YOU FOR CHOOSING DEEP ROOT

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