



Roadside User manual

Run your store's website from one place: hours, products, orders, messages and more.

Welcome to Roadside

Roadside is the control panel behind your store's website. You use it to change your hours, add a product, answer a customer's message, check an online order and see how many people visited this week. The routine jobs take a few minutes, and you can do them between customers.

Dirt Road Software looks after the website itself: its design and its technical upkeep. You look after what it says. If you want something the panel cannot change, such as a new photo at the top of the home page, you ask for it through Website changes and we do it.

How to use this manual

You do not have to read it front to back. Read Chapter 1 once, then go to the job in front of you. The last pages list every screen in the panel with the page that explains it.

The screenshots show one store, Baker Feed & Country Store, set up with made-up customers and orders. This manual calls it the sample store. Your menu may show a little more or less than the pictures, because it depends on your role and on what your plan includes.

How the pages are marked

WHERE TO FIND IT



Website



Store info

Store owner, Manager

A bar like the one above starts every section that has a screen of its own. It shows where to click in the left-hand menu and who can use the screen.

WORDS TO KNOW

A word you may not know

Boxes like this explain a technical word the first time it comes up in a chapter. The glossary at the back repeats them all.

GOOD TO KNOW

A shortcut, or a fact that saves you a phone call.

 CAREFUL

Something your customers will see, or something that cannot be undone.

Words in bold, like **Save**, are labels exactly as they appear on screen. Orange numbers on a screenshot match the numbered list under it. When this manual says *press*, it means a button or a link. *Choose* is for lists and round buttons, *tick* is for a square box, and *type* is for a field.

Who this manual is for

Your role decides what you see in the menu. The **Store owner** and the **Manager** run the store day to day, and most of this manual is written for them. A **Manager** can do nearly everything a Store owner can. The Store owner also opens Account and Billing and adds or removes team members. The Manager also reads the audit log, which is the list of who changed what. **Staff** and **Read only** people have shorter menus, for work at the counter and the shelves. Chapter 26, Your team and what each role can do (page 211) shows every role side by side.

The bar at the top of each section tells you which roles can use that screen. If a screen in the manual is not in your menu, your role does not include it, and the Store owner can tell you why.

First edition, October 2026, written for Roadside 0.5.0. If a screen on your computer looks a little different from the picture, we have probably improved it since. Questions about this manual: support@dirtyroadsoftware.com.

Contents

PART 1 GETTING STARTED

1	Meet your panel	6
2	Your first week	14

PART 2 YOUR STORE ON THE WEB

3	Hours, closed days and contact details	18
4	The sign at the top of your website	25
5	Messages and your website assistant	31
6	Reviews, and questions and answers	39
7	Old links	45
8	How your changes reach the website	49

PART 3 PRODUCTS

9	Finding your way around products	58
10	Add or edit a product	66
11	Sizes, prices and photos	74
12	Descriptions, feed tags and Fetch with AI	82
13	Stock	90
14	Importing and exporting products	97
15	Compliance watch and Pricing check	102

PART 4 SELLING ONLINE

16	How online ordering works	110
17	Store settings	118
18	Working the orders	128
19	Payments, holds and refunds	138

PART 5 CUSTOMERS AND MARKETING

20	Customer accounts and contacts	146
21	The email list	156
22	Articles	167
23	Analytics	180

PART 6 YOUR ACCOUNT WITH DIRT ROAD

24	Website changes	194
25	Account and Billing	202

PART 7 PEOPLE AND SECURITY

26	Your team and what each role can do	211
27	Signing in safely	218
	Quick answers	226
	Glossary	228
	Where to find each screen	233



PART 1

Getting started

Sign in, find your way around, and set up your first week.

1 Meet your panel

Roadside is where you run your store's website. This chapter covers signing in, how the screens are laid out, and where to find the things you will use every week.

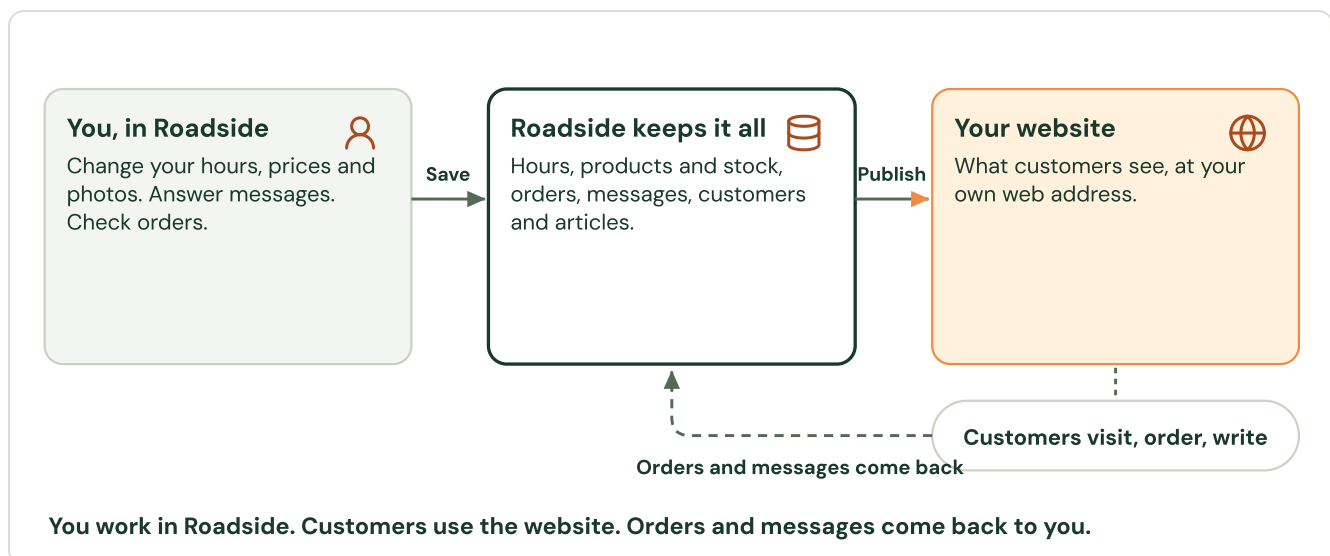
IN THIS CHAPTER

- What Roadside does
- Signing in, and signing out
- The menu, group by group
- Find anything, and the New button
- Website home
- Light and dark, and your own settings

What Roadside does

Your website shows customers what you carry, when you are open and how to reach you. Roadside is the panel behind it. You change a price, an opening time or a photo in Roadside, and the website shows the change a few minutes later. Customers never see Roadside. They see the website.

The flow also runs the other way. When a customer places an order or sends a note from the contact page, it lands in Roadside for you.



WORDS TO KNOW

Panel

The set of screens you sign in to. Some people call it the admin panel or the back end. This manual says Roadside, or the panel.

Workspace

Your store's own private space inside Roadside, with its own people, products and messages. Nobody from another store can see yours. The name of yours sits at the top of the menu.

Sign in

WHERE TO FIND IT **Roadside sign-in page**

Everyone

Roadside has one address for every store: **roadside.dirtroadsoftware.com**. Save it as a bookmark on the computer at the counter and on your phone. Dirt Road sets up your first sign-in and emails you an invitation. The invitation link works once and expires after 7 days. If yours has expired, write to **support@dirtroadsoftware.com** and we will send another.

The screenshot shows the 'Sign in' page with the following elements and callouts:

- 1** Email: Points to the email input field.
- 2** Password: Points to the password input field.
- 3**: Points to the orange 'Continue' button.
- 4**: Points to the 'Forgot your password?' link.

- 1** Your email address. It does not matter whether you use capital letters.
- 2** Your password.
- 3** Press Continue to sign in.
- 4** Use this link if you have forgotten your password.

The sign-in page.

- 1** Type your email and password, then press **Continue**.
- 2** Type the six-digit code from your phone. Roadside asks for it each time you sign in, unless you ticked **Remember this browser for 30 days** on that computer. The words box below says where the code comes from.
- 3** You land on **Website home**. That is your starting screen.

WORDS TO KNOW

Two-step sign-in

After your password, you type a six-digit number from an app on your phone. Someone who finds your password still cannot get in without your phone. The sign-in screen calls this *two-factor*.

Authenticator app

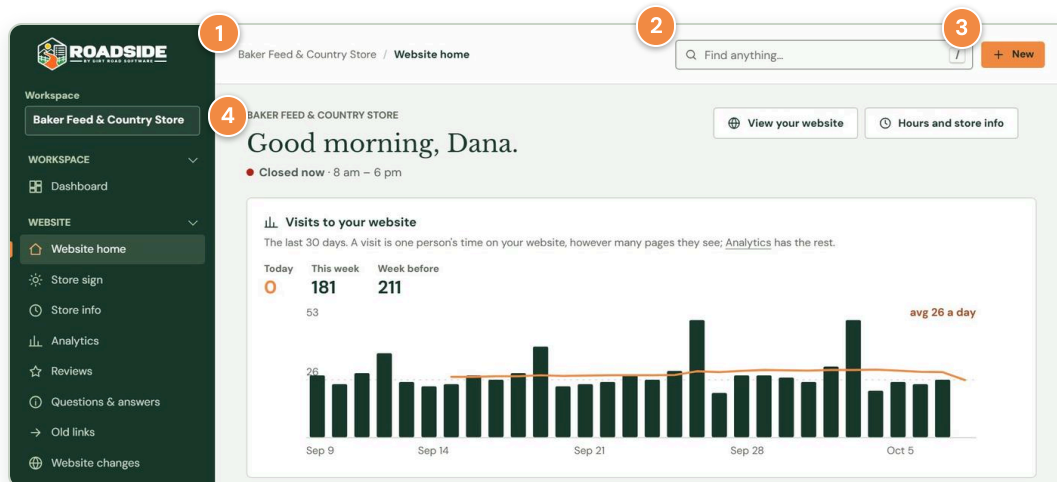
A free phone app, such as Google Authenticator, Microsoft Authenticator, 1Password or Authy, that shows a new six-digit code every 30 seconds.

Your password needs at least 14 characters. A short sentence of four or five unrelated words works well and is easier to remember than a jumble of symbols.

Roadside signs you out after an hour with no activity, and after eight hours no matter what. It also signs you out when you press **Sign out** at the bottom of the menu. On a shared counter computer, always sign out when you walk away. Chapter 27, Signing in safely (page 218) covers resetting a forgotten password and what to do if you are locked out.

How every screen is laid out

Every screen has the same three parts: a menu down the left side, a bar across the top, and the working area in the middle. On a phone the menu hides behind a button at the top left. Press it to open the menu and press the ✕ to close it.

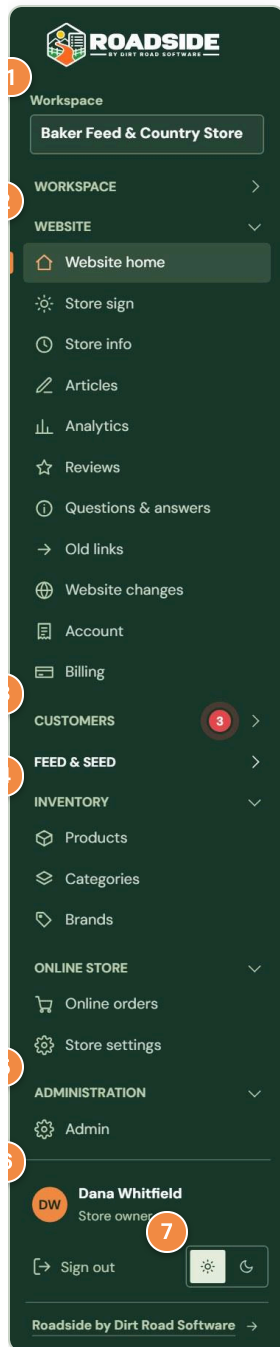


- 1 Where you are. The store's name, then the name of the screen.
- 2 The search box. Press **/** on your keyboard to jump to it from any screen.
- 3 The New button, for starting a new record.
- 4 The working area. Its heading and what it shows change from screen to screen.

The top of Website home, with the parts that stay the same on every screen.

The menu, group by group

The menu is the only navigation you need. The groups fold shut when you press their headings, and Roadside remembers which ones you left open. Which items you see depends on your role and on what your plan includes, so your menu may have a little more or less than the one pictured.



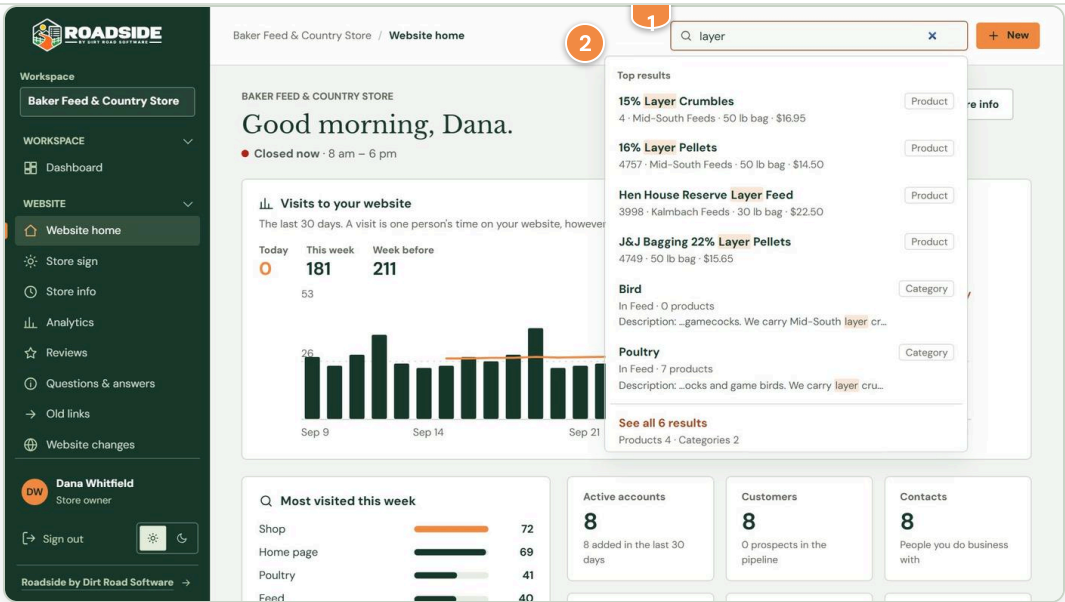
- 1 Your workspace: the store's name.
- 2 Website: everything that shows up on the website.
- 3 Customers: messages, the email list and customer accounts. Pictured shut, as Roadside lets you fold any group.
- 4 Inventory: products, departments and brands.
- 5 Admin: Users, for adding and removing people. Only the Store owner sees it.
- 6 You: press your name to open your own settings.
- 7 Light and dark switch.

The menu as a Store owner sees it.

GROUP	WHAT IS INSIDE	CHAPTER
Workspace	Dashboard, a plainer starting page. Website home is the one most people use.	Website home, in Chapter 1 (page 12)
Website	Website home, Store sign, Store info, Analytics, Reviews, Questions & answers, Old links, Website changes, Account and Billing.	Chapter 3, Hours, closed days and contact details (page 18)
Customers	Messages, Assistant, Email list, Accounts and Contacts.	Chapter 5, Messages and your website assistant (page 31)
Feed & Seed	Compliance watch, a list of customer documents that are about to expire.	Chapter 15, Compliance watch and Pricing check (page 102)
Inventory	Products, Categories and Brands.	Chapter 9, Finding your way around products (page 58)
Online store	Online orders and Store settings. These appear when your store takes orders online.	Chapter 16, How online ordering works (page 110)
Administration	Admin, with Users for adding and removing people (Store owner) and the audit log, a list of who changed what (Manager).	Chapter 26, Your team and what each role can do (page 211)

Find anything

The search box at the top of every screen looks through products, brands, departments, customers, orders, articles and the settings pages. Type at least two letters and a list of the best matches drops down. Use the arrow keys and press **Enter** to open one, or press **Esc** to close the list.



- 1 What you type. Words that match are highlighted in the results.
- 2 The best matches first, each with a tag saying what kind of thing it is.

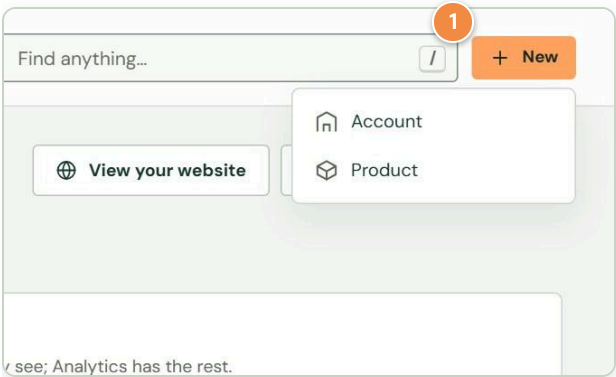
Typing “layer” shows matching products and departments.

GOOD TO KNOW

Search also finds settings. Type *two-factor*, *time zone* or *logo* and it takes you to the page that controls that.

The New button

The orange **New** button at the top right starts a new record from any screen: a customer account, a product or an article. It shows only what your role is allowed to create.



- 1 Press the one you want. You land on its blank form.

The New menu.

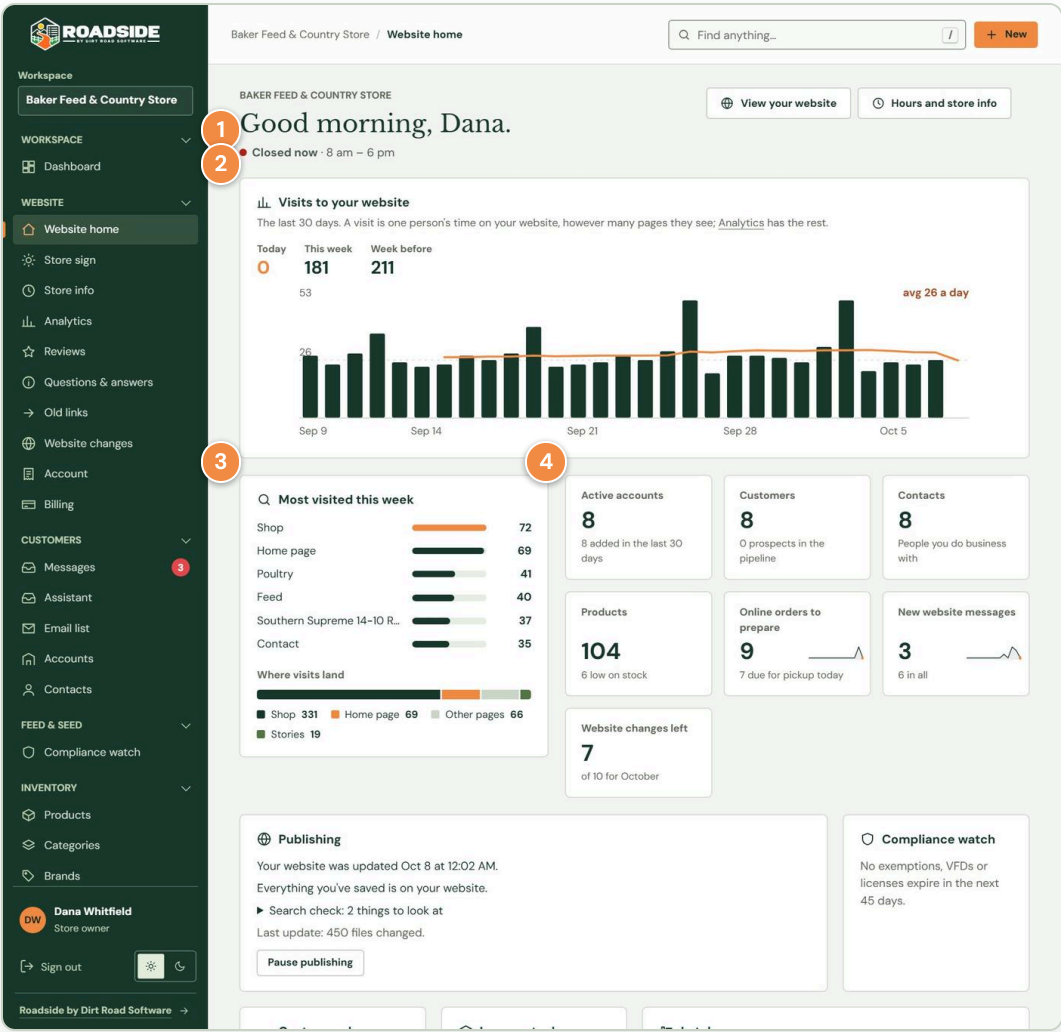
Website home

WHERE TO FIND IT

 Website >  Website home

Store owner, Manager

If you are a Store owner, Website home is the first screen after you sign in. It answers three questions at a glance: is the store open right now, how many people visited the website, and what is waiting for you.



- 1 Whether the store is open now, worked out from your hours and closed days.

2 Visits to the website over the last 30 days, one column per day.
- 3 The pages visitors looked at most this week.

4 Number cards: new messages, website changes left this month, products, orders to prepare. Press a card to open that screen.

Website home for the sample store.

 WORDS TO KNOW**Visit**

One person's time on your website, however many pages they look at. If one person opens six pages in a row, that is one visit.

Further down, Website home has a **Publishing** tile that tells you whether the website has your latest changes. Chapter 8, How your changes reach the website (page 49) explains it. The **Lately** list at the bottom shows the last eight changes anyone made in your workspace.

Light and dark

The sun and moon switch at the bottom of the menu changes the colors of the panel. Light is the default. The choice is saved in that one browser, not on your account, so the counter computer can stay light while your phone stays dark.

Your own settings

Press your name at the bottom of the menu to open **My account**. It holds your name and phone number, your password, your two-step sign-in and the browsers you have asked Roadside to remember. Details are in Chapter 27, Signing in safely (page 218).

2 Your first week

Most of the first week is checking that what the website says about your store is true. This chapter is a short list for each stretch, then a ten-minute routine to keep it that way.

IN THIS CHAPTER

- Day one: your details
- The first few days: products and messages
- A ten-minute routine
- What Dirt Road looks after
- When to write to us

Day one: make the website tell the truth

Customers read your hours and phone number before they read anything else. Start there.

- ☐ **Turn on two-step sign-in.** It takes about three minutes and keeps your store's records yours. Chapter 27, Signing in safely (page 218) walks through it.
- ☐ **Check your phone number, email and address.** They are on Chapter 3, Hours, closed days and contact details (page 18). The email is also where messages from the contact page are sent.
- ☐ **Check each day's hours.** Fix any that are wrong and add the next holiday as a closed day.
- ☐ **Set the baby chicks sign to what is true today.** Chapter 4, The sign at the top of your website (page 25) shows how, and how to put up a message such as "Fresh hay just arrived".
- ☐ **Look at your website.** Wait a few minutes after saving, then open it in another tab and read the home page as a customer would.

The first few days: look at what you sell

- ☐ **Scroll through your products.** Check that prices, sizes and photos look right. Chapter 9, Finding your way around products (page 58) explains the list and its filters.
- ☐ **Open the five you sell most.** Look at each one's sizes, price and photo. Chapter 10, Add or edit a product (page 66) covers changing them.

- ☐ **Hide anything that should not be online.** A product can stay in Roadside and stay off the website.
- ☐ **Set a reorder point on your fast movers.** Roadside then marks them Low when the count drops, and the Website home page lists them. See Chapter 13, Stock (page 90).
- ☐ **Add your Google and Facebook ratings.** Type them in once and update them when they change. See Chapter 6, Reviews, and questions and answers (page 39).
- ☐ **Send yourself a message.** Use the contact page on your website, then find the note in Messages. If it arrives, customers' notes will too. See Chapter 5, Messages and your website assistant (page 31).
- ☐ **If you take orders online, read each tab of Store settings.** Pickup days, delivery distance and checkout wording are yours to set. See Chapter 17, Store settings (page 118).

A ten-minute routine

Website home is the page to start from. It shows what is waiting for you without making you open every screen.

WHEN	WHAT TO CHECK	WHERE
Each morning	New messages, and orders to prepare if you sell online.	Messages in the menu shows a red count. Online orders to prepare is a card on Website home.
Once a week	Products that are low on stock, how many people visited, and where your website changes stand.	The Low on stock tile and the visits chart on Website home. Website changes in the menu.
Before a holiday or a storm	Add the closed day. Put up a temporary message if you want customers to know sooner.	Store info and Store sign.
Once a month	Update your review counts. Look at your invoices. Your website changes start over on the first.	Reviews, Account and Website changes.

What Dirt Road looks after

You change the information. We look after the website itself: its design and its technical upkeep. When you want something the panel does not change, such as the photo at the top of the home page, a new page or a different layout, you send it to us as a website change and we do the work. Chapter 24, Website changes (page 194) explains how that works and what counts as one change.

When to write to us

IF YOU NEED TO	DO THIS
Swap a photo, rewrite a paragraph or add a page	Send a website change from Website changes in the menu.
Add or remove someone who uses Roadside, or change their role	The Store owner does it under Admin, then Users. A Manager asks the Store owner. See Chapter 26, Your team and what each role can do (page 211).
Change what a role is allowed to do, or connect a card processor	Write to support@dirtyroadsoftware.com and tell us what you want to change.
Get back in after losing your phone or being locked out	Read Chapter 27, Signing in safely (page 218) first. If you are still stuck, write to support.
Report something that looks wrong on a screen	Write to support with the name of the screen, what you pressed, what you expected and the message you saw. A picture of the screen helps.
Ask about an invoice	Reply to the invoice email, or write to support.



PART 2

Your store on the web

Your hours, your sign, your messages and the way a change reaches the website.

3 Hours, closed days and contact details

Store info is where you keep your phone number, address, weekly hours and closed days. Your website reads them from here, so you change a detail once and every page that shows it follows.

IN THIS CHAPTER

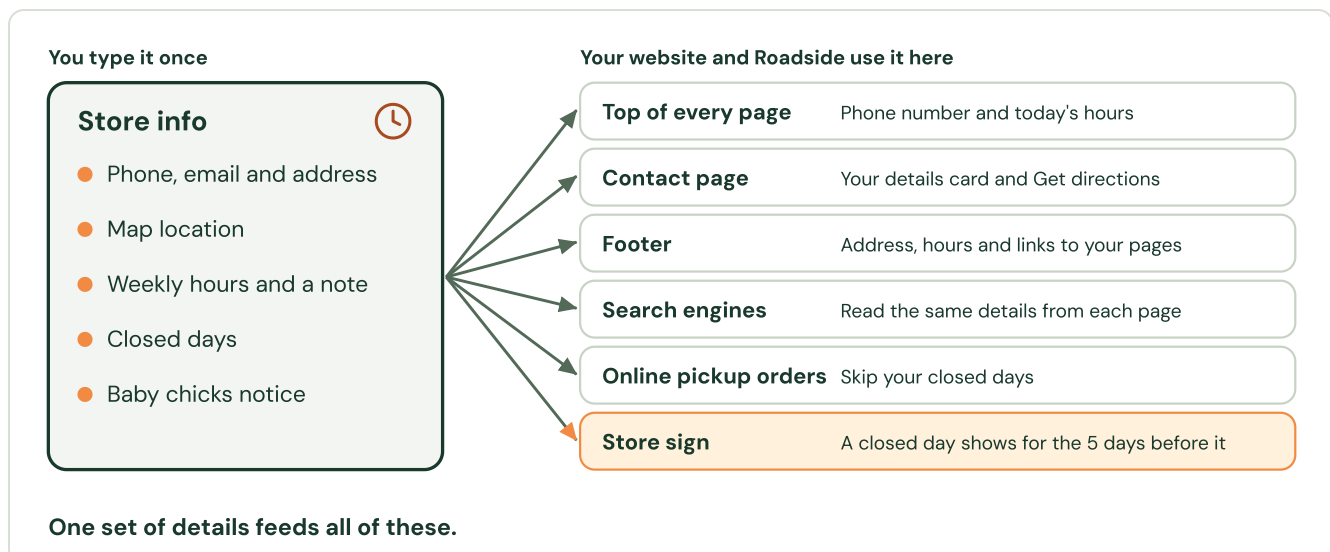
- Where your details show up
- Phone, email, address and map location
- Links to your other pages
- Weekly hours
- Closed days
- The Baby chicks notice
- Saving, and when customers see it

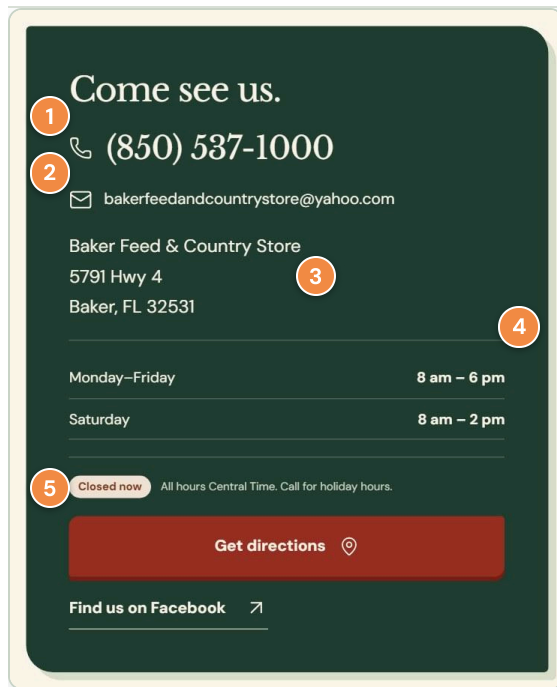
One screen, many places

WHERE TO FIND IT  **Website** >  **Store info**

Store owner, Manager

Type your hours and contact details once. Roadside puts them wherever your website needs them: the top of every page, the contact page, the footer and the pages that list your hours. Search engines read the same details from your pages. Online pickup orders use your closed days too, so a customer cannot choose a pickup day when the store is shut.





- 1 Your phone number. On a phone, a customer presses it to call.
- 2 Your email address.
- 3 Your address, with a Get directions button below.
- 4 Your weekly hours.
- 5 The note under your hours, next to a tag that says whether you are open right now.

The contact page on the website. Each detail comes from Store info.

Both Store owners and Managers can change Store info. Staff do not see it in their menu.

Phone, email, address and map location

The first card holds the four details customers look for first. The phone number, email and address appear on the contact page and in the footer. Messages from your contact page go to the email address you type here (Chapter 5, Messages and your website assistant (page 31)).

- 1 Phone. Type it the way customers should read it, like (850) 537-1000. It needs at least 7 digits.
- 2 Email. Roadside saves it in lower case.
- 3 Address. One line for each line of the address.
- 4 Map location. Two numbers with a comma between.

The How to reach you card.

Put the street on the first line and the city, state and ZIP code on the second, written like **Baker, FL 32531**. Roadside reads that second line to tell search engines your city, state and ZIP code. If you write it another way, they get the street only.

The map location is where your door is, as two numbers. Open Google Maps, right-click your store, and choose the numbers at the top of the menu that appears to copy them. Paste them into the box. They look like **30.796938, -86.681478**. Search engines and maps use them, and so does your website assistant to measure how far a delivery is (The website assistant, in Chapter 5 (page 35)). Empty the box to clear the pin.

WORDS TO KNOW

Map location

Your store's position on the map, written as two numbers: latitude, then longitude. Google Maps gives you both when you right-click a spot.

Your pages elsewhere

Your website's footer links to your Facebook page, your Google Business Profile and your Instagram page. Copy each address from your browser's address bar and paste it in. If you leave off the **https://** at the start, Roadside adds it. Leave a box empty to leave that link out.



Your pages elsewhere

Facebook page

Google Business Profile

Instagram

Your website's footer links to these. Leave one empty to leave it out.

- 1 Your Facebook page.
- 2 Your Google Business Profile.
- 3 An empty box means no Instagram link on your website.

The Your pages elsewhere card. Two links are filled in and Instagram is left empty.

Weekly hours

Tick **Open** for each day you are open and set an opening and a closing time. A day with the box unticked shows as closed. The card tells you which time zone the times are in, such as Central Time. You cannot change the time zone here; it belongs to your store's record.

Hours
Times are Central Time. Leave a day unchecked if you're closed that day.

Monday	☒ Open	1 8:00 AM	to	06:00 PM
Tuesday	☒ Open	08:00 AM	to	06:00 PM
Wednesday	☒ Open	08:00 AM	to	06:00 PM
Thursday	☒ Open	08:00 AM	to	06:00 PM
Friday	☒ Open	08:00 AM	to	06:00 PM
Saturday	☒ Open	08:00 AM	to	02:00 PM
Sunday	☐ Open			

3

Note under the hours (optional)

4 All hours Central Time. Call for holiday hours.

- 1 Tick Open on every day you are open.
- 2 Opening time, then closing time.
- 3 An unticked day is closed all day. Sunday here.
- 4 A note under your hours, up to 200 characters.

The Hours card.

Each day has one opening time and one closing time, and the closing time has to be later. A lunch break, or a day with two shifts, cannot be entered. Roadside joins days that share the same times, so Monday to Friday shows on one line on the contact page.

The small **Open now** or **Closed now** tag on the contact page is worked out in the visitor's browser from your hours and closed days, so it is right at the moment they look. Website home shows the same answer for you.

Closed days

Holidays, inventory days and bad weather go here: dates you will not be open. Your website shows them ahead of time, and pickup orders skip them. In the five days before a closed day, the sign at the top of your website says so too (Chapter 4, The sign at the top of your website (page 25)).

Closed days
Holidays, inventory days, bad weather. Your website shows them ahead of time, and pickup orders skip them.

1 11/26/2026	2 Thanksgiving Day	3
12/25/2026	Christmas Day	
01/01/2027	New Year's Day	
01/04/2027	Inventory day	
mm/dd/yyyy	Christmas Day	

4 + Add a closed day

- 1 The date. Choose it from the calendar or type it.
- 2 What it is for, such as Christmas Day. Optional, up to 80 characters.
- 3 The trash button takes that day off the list.
- 4 Add a closed day gives you another row.

The Closed days card, with four days listed and room for the next.

There is always one empty row at the end. Fill it in, or press **Add a closed day** for more. You can list up to 60 days. A date that has already passed is dropped when you save, so the list never fills up with old holidays.

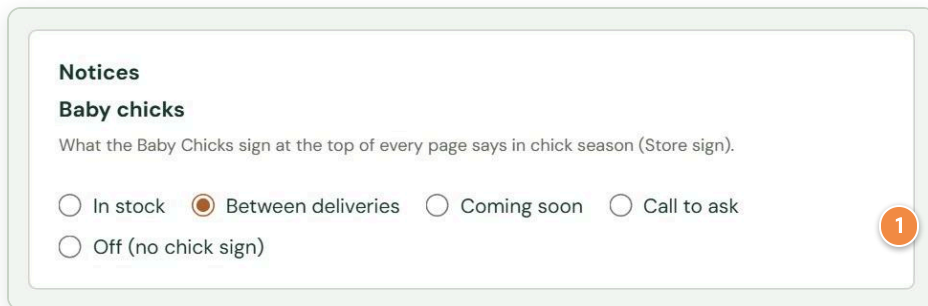
A closed day is closed from opening to closing. Roadside cannot enter a short day here, like closing at noon the day before a holiday. Put that in the note under your hours, or put up a temporary message on the Store sign.

GOOD TO KNOW

The weekly hours handle the day of the week, and closed days handle dates. A store that is shut every Sunday leaves Sunday unticked. It does not need fifty-two closed days.

The Baby chicks notice

The last card, **Notices**, appears when your website's design has a switch for one. The sample store's has one, for baby chicks. It sets what the Baby Chicks sign at the top of the website says during chick season.



- 1 Choose one. Between deliveries is what the sign says until you change it.

The Notices card.

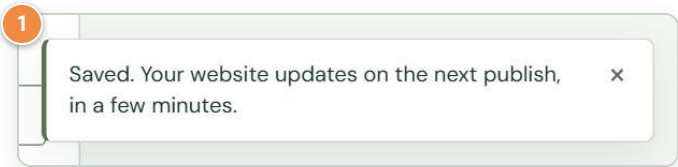
The five choices are **In stock**, **Between deliveries**, **Coming soon**, **Call to ask** and **Off (no chick sign)**. This is the same setting you find on the Store sign screen, so changing it in either place changes both. Baby chicks, in Chapter 4 (page 29) shows what each choice puts on the sign.

Save, and when customers see it

Press **Save store info** at the bottom of the screen. Everything on the screen is saved together. If any field is wrong, nothing is saved and the fields to fix are marked in red under a banner that says to check them. **Cancel** takes you back to Website home without saving.

WHERE	WHAT ROADSIDE SAYS
Phone	Enter the store's phone number, like (850) 537-1000.
Email	That email address doesn't look right.
Map location	Enter the latitude and longitude with a comma between, like 30.796938, -86.681478.
A link	That Facebook page address does not look right. Copy it from the address bar. The same words name Google Business Profile or Instagram when one of those is wrong.
A day's hours	Enter the opening and closing times for Tuesday, or mark it closed. Or: Tuesday's closing time needs to be after its opening time.
The whole week	Open at least one day of the week.
A closed day	Pick a date for each closed day. Or: List up to 60 closed days at a time.

When the save works, a green note appears in the corner of the window for a few seconds.



- 1 It says when your website will show the change.

The note after a good save.

The change is in Roadside at once. Your website shows it with the next update, a few minutes later. Chapter 8, How your changes reach the website (page 49) explains what happens in between and how to see it on Website home.

 GOOD TO KNOW

The line under the heading of this screen says changes show as soon as you save. That holds for Roadside itself. For your website, trust the note in the corner: a few minutes.

What is not on this screen

Your store's name, logo and time zone are not on Store info. Write to **support@dirtyroadsoftware.com** and we will change them. Photos, wording and the layout of a page are part of your website's design, and you ask for those as a website change. The **Request a change** button on the right side of Store info takes you there (Chapter 24, Website changes (page 194)).

If your Roadside plan is suspended, cancelled or expired, saving Store info is paused and a red banner says so. The website stays online. The owner can see the plan and pay on the Account screen (Chapter 25, Account and Billing (page 202)); Managers cannot open it.

4

The sign at the top of your website

The Store sign is the small card at the top of every page of your website. It tells customers one timely thing at a time: a message you type, a closed day coming up, or the season you are in.

IN THIS CHAPTER

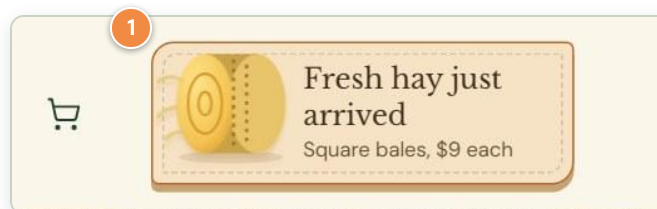
- What customers see, and which sign wins
- Put up a temporary message
- Seasonal signs
- The Baby chicks status
- How soon a change shows

What the sign shows

WHERE TO FIND IT  **Website** >  **Store sign**

Store owner, Manager

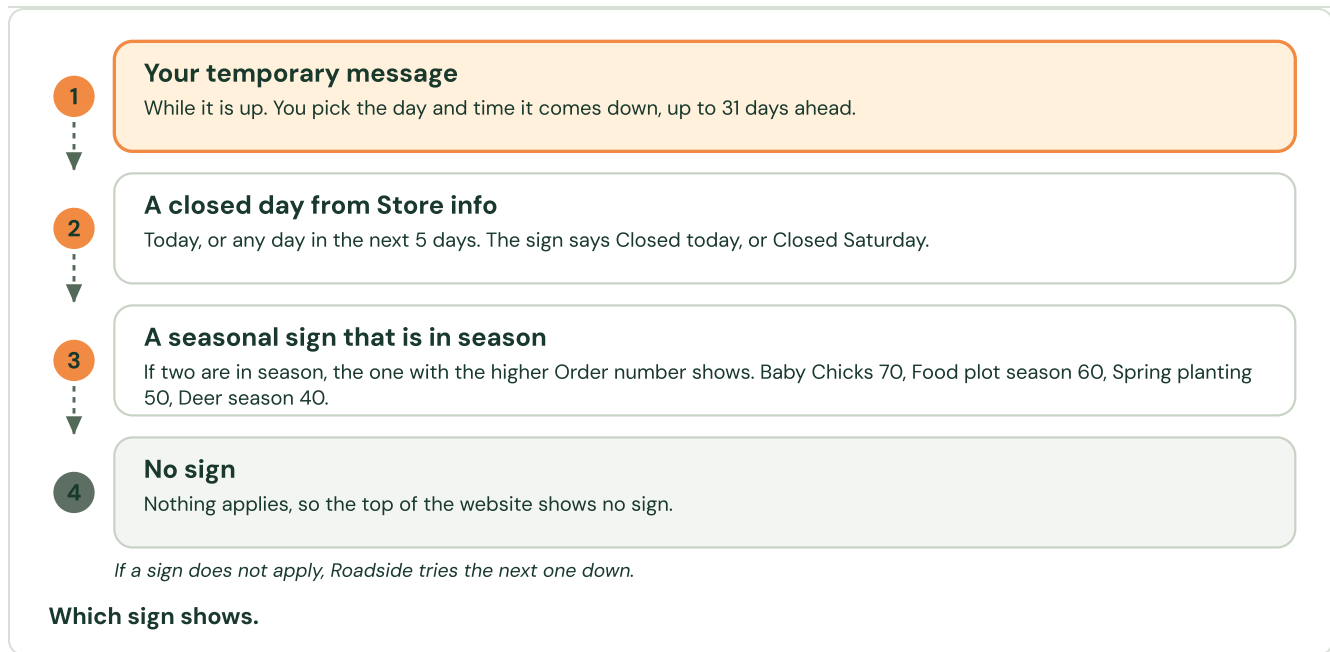
This screen appears when your plan includes the Feed & Seed features, which the sample store's does. In the sample store's design the sign sits in the top right corner of the header on every page. It has a small drawing, a bold headline and a few words. A sign with a link opens that page when a customer presses it. A sign without a link calls the store. The Baby Chicks sign opens a small panel with more words first. Store owners and Managers can both put up and change signs.



- 1** The sign: a drawing, a headline and a few words.

A temporary message as customers see it, at the top of the website.

Only one sign shows at a time. Roadside goes down this list and shows the first one that applies.



The **Showing now** card at the top of the screen tells you what the website is showing and why. It says whether the sign is your temporary message, a closed day from Store info, the Baby Chicks sign or a seasonal sign, and it says when the sign comes down. When nothing applies, it says there is no sign and the website shows none.

Put up a temporary message

A temporary message is for news with a short life: fresh hay, closing early, a storm on the way. It goes to the top of the list and comes down by itself at the time you choose. There is room for one message at a time. Putting up a new one replaces the old one.

- 1 Type the headline.** A few words, like *Fresh hay just arrived*.
- 2 Add a few more words if you want them, and choose a picture.** A price or a hint is enough. Announcement is the default picture.
- 3 Add a link if the sign should take customers somewhere.** Type an address on your website that starts with a slash, like `/shop/feed`. A full `https://` address works too, and so does `tel:` followed by a phone number. Button words, up to 40 characters, change what the sign's button says.
- 4 Pick when it comes down.** The form starts with tomorrow at 6:00 pm. Change the day and time to suit.
- 5 Press Put it up.**

Temporary message

Fresh hay, closing early, a storm: it goes to the top of the sign and comes down by itself at the time you pick.

Headline

Fresh hay just arrived

A few more words

Call or stop by the store

Picture

Hay

Link (optional)

/shop/feed

An address on your website, like /shop/feed. Without one, the sign's button calls the store.

Button words (optional)

See what's in

Take it down

10/09/2026 06:00 PM

Store time (America/Chicago). Up to 31 days ahead.

Put it up

- 1 Headline, up to 40 characters. Required.
- 2 A few more words, up to 60 characters.
- 3 Picture: Baby chick, Seedling, Hay, Deer, Feed bag, Clock, Calendar, Rain, Snowflake, Sun, Announcement or Truck.
- 4 Link, optional. Where the sign takes a customer. Leave it empty and the sign calls the store.
- 5 Take it down: the day and time it comes off, in store time, up to 31 days ahead.
- 6 Put it up.

The Temporary message form, filled in.

Roadside tells you when the message comes down, and the website shows it within a minute. While a message is up, the form carries a green **Up** tag and the button reads **Save message**, so you can fix a typo. A second button, **Take the message down now**, removes it early.

Showing now

Fresh hay just arrived Square bales, \$9 each

Your temporary message. Up until Fri, Oct 9 at 6:00 pm.

- 1 Your headline and words, and the time it comes down.

Showing now while a temporary message is up.

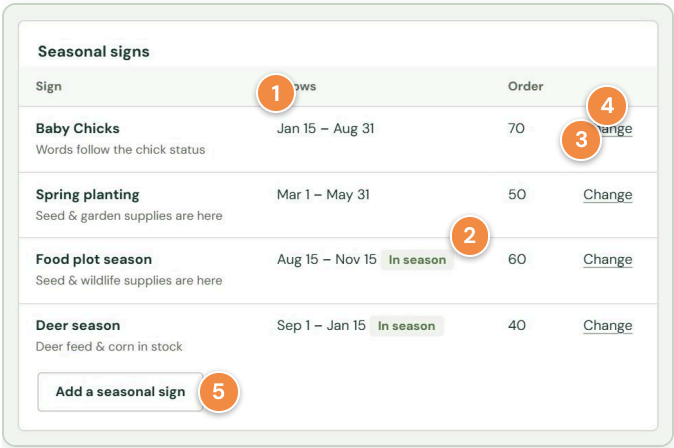
IF ROADSIDE SAYS	IT MEANS
What should the sign say? A few words, like "Fresh hay just arrived".	The headline is empty.
When should it come down? Pick a day and a time.	The day or time is missing.
That time has passed. Pick a time later than now.	The time is already behind you.
A temporary message stays up 31 days at most. For something longer, add a seasonal sign.	The day is more than 31 days away.
Use an address on your website starting with /, like /shop/feed, a full https:// address, or tel: and a phone number.	The link is not one of those three kinds.

Seasonal signs

Some signs belong to a time of year. A seasonal sign shows between two dates every year, whenever nothing ranks above it. Every store starts with four. The table lists them as the sample store has them.

SIGN	SHOWS	ORDER	CUSTOMERS PRESS IT TO
Baby Chicks	Jan 15 to Aug 31	70	Call the store, or read the chick status.
Spring planting	Mar 1 to May 31	50	See farm and garden supplies.
Food plot season	Aug 15 to Nov 15	60	See farm supplies.
Deer season	Sep 1 to Jan 15	40	See deer feed.

Two signs can be in season at once, as Food plot season and Deer season are in the picture below. Food plot season has order 60 and Deer season has 40, so the website shows Food plot season. The numbers run from 1 to 89. Closed days and your temporary message always come first, so 89 is the highest number you can give a sign.



- 1 Each sign with its few words underneath.
- 2 A green In season tag. A grey Off tag means you have switched the sign off.
- 3 Order: when two signs are in season, the higher number shows.
- 4 Change opens the sign's own form.
- 5 Add a seasonal sign makes a new one.

The Seasonal signs card, with two signs in season.

Press **Change** on a row, or **Add a seasonal sign**, to open the form for one sign. It is the same form for both.

FIELD	WHAT GOES IN IT
Headline	Up to 40 characters. Required.
A few more words	Up to 60 characters.
When someone opens the sign	Optional, up to 200 characters. What customers read when they press the sign.
Picture	The same list as the temporary message, without the baby chick, which belongs to the Baby Chicks sign.
Link and Button words	The same rules as the temporary message.

FIELD	WHAT GOES IN IT
Shows every year from, and Through	A month and a day each. A season can run over New Year: September 1 through January 15 is fine. A day that is not in the month, such as February 30, gets a message saying the month has no such day.
Show this sign in season	Tick to use the sign. Untick to switch it off.
Order	A number from 1 to 89.

A seasonal sign cannot be deleted. To retire one, untick **Show this sign in season** and the list marks it Off. The Baby Chicks sign has the same form with fewer fields: its headline, link, button words, dates, order and switch. Its other words follow the chick status below.

Baby chicks

The status you choose here sets what the Baby Chicks sign says. The sign shows from January 15 through August 31 each year, so a status you set in October waits until chick season comes round.

Baby chicks

What the Baby Chicks sign says during chick season.

☐ In stock

"Baby Chicks are IN STOCK!"

☒ Between deliveries

"Baby Chicks are not in stock."

☐ Coming soon

"Baby Chicks are coming soon!"

☐ Call to ask

"Baby Chicks Call for availability."

☐ Off (no chick sign)

Save

- 1 Choose one status.
- 2 Press Save.

The Baby chicks card.

YOU CHOOSE	THE SIGN SAYS	THE PANEL IT OPENS SAYS
In stock	Baby Chicks are IN STOCK	The little peeps are here. Call the store for available breeds before you head over.
Between deliveries	Baby Chicks are not in stock.	No little peeps just yet. Call the store to ask about the next arrivals.
Coming soon	Baby Chicks are coming soon	Chick season is almost here. Call the store to ask when the first ones arrive.
Call to ask	Baby Chicks Call for availability.	Looking for little peeps? Give us a call for current chick availability and breeds.
Off (no chick sign)	Nothing. Another sign can use the spot.	

Between deliveries is the status until you choose another. The same status is on Store info under Notices (The Baby chicks notice, in Chapter 3 (page 22)). If your plan includes the website assistant, it uses this status when a visitor asks about chicks.

How soon a change shows

The sign is the one part of your website that does not wait for an update. The website asks Roadside for the sign each time a page opens and remembers the answer for a minute, so a change shows within a minute of saving. If it has not appeared, wait a minute and reload the page.

A closed day you add on Store info makes a sign the same way. The closed day also appears on the contact page and in your hours lists, and those follow with the next update, a few minutes after you save (Chapter 8, How your changes reach the website (page 49)).

5 Messages and your website assistant

Messages is your inbox for notes customers send from your website's contact page. If your plan includes a website assistant, its conversations, the questions customers ask and the contact details people leave are on the Assistant screen.

IN THIS CHAPTER

- What customers type on the contact page
- The Messages inbox, and what its tags mean
- Reading, answering and clearing a message
- Call-back requests
- Where each message goes, and what Not emailed means
- The website assistant, and what you control on its screen

What customers send

The contact page has a short form. A customer types a name and either an email address or a phone number, may choose what the note is about, writes the message and presses **Send message**. The page then thanks them and says the note is on its way to the store.

Send us a note.

Tell us what you're after and how to reach you. We answer during store hours, usually the same day. What you send stays with the store: see how we handle it.

Your name

Email Phone

What's it about?

Choose one (optional)

Message

Send message

- 1 Your name. Required.
- 2 Email. The customer gives this or a phone number.
- 3 Phone.
- 4 What is it about. Optional, from a short list.
- 5 The message, up to 4,000 characters.
- 6 Send message.

The form on the contact page of the website.

If something is missing, the form tells the customer in plain words, such as *Tell us your name.* or *Leave an email address or a phone number so we can get back to you.* One connection can send five notes in an hour. After that the form says to call the store. Form-filling robots are caught by a box real visitors never see, and their notes are dropped quietly, so you never have to sort spam out of your inbox.

The Messages inbox

WHERE TO FIND IT

 Customers >  Messages

Store owner, Manager

Messages is in the Customers group of the menu, with a red number beside it for the notes nobody has opened yet. Each note is a row, newest first, with 50 rows to a page and **Newer** and **Older** buttons when there are more. Unread rows are in bold. Store owners and Managers can both read, mark and delete messages.

WEBSITE

Messages

What people send from the contact page on your website, and what Daisy passes on from the chat. Open one to reply by email or call them back.

All 6

New 3

1

From	Message	Received
Marcus Reed New 2 A feed or product question	Do you carry the Southern Supreme 14-10 Race Formula in the 50 lb bag, and is there any on the shelf today? I'm driving over from Milton af...	Oct 7
Jason Barfield New Call back Daisy Baby chicks	Daisy took this one. Jason asked about baby chick availability and wants to order 25 Rhode Island Reds when they come in. He asked for a ca...	Oct 7
Tammy Lowe Delivery	Can you deliver ten bags of layer pellets to a farm off Highway 189? I'm about fourteen miles from the store. Thursday works best.	Oct 6
Rita Cole New Not emailed Tack or saddles	Is the Ran Ten 16 roper saddle on the floor? I'd like to sit in it Saturday morning before I decide.	Oct 6
Pete Hollis Something else	Do you take back unopened bags of feed? I bought the wrong formula last week and still have the receipt.	Oct 6
Angela Brooks A feed or product question	What's the difference between the 16-7 Mare and Foal and the 14-10? I have one broodmare and a yearling.	Oct 4

- 1

All shows every message. New shows only the ones nobody has opened.
- 2

A tag on the row. The tags are explained below.

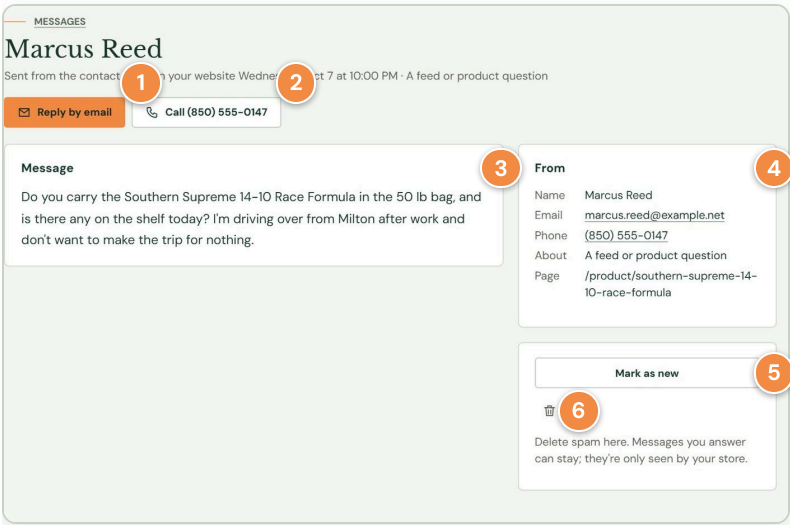
The Messages list.

TAG	WHAT IT MEANS
New	Nobody has opened the message. The row is in bold, and the red count on the menu includes it.
Call back	The customer asked for a phone call.
Daisy	The note came from the website assistant. The tag carries the assistant's name.
Not emailed	The note is in Messages, but the email to you did not go out. Point at the tag on screen to see why.

The columns are **From** (the name, the tags and what the note is about), **Message** (the first 140 characters) and **Received** (the time if it came today, otherwise the date). When there is nothing here yet, the screen says so and tells you notes from the contact page will show up. When you have opened everything, it says you are all caught up.

Read and answer a message

Press the sender's name to open the message. Opening it marks it read, and the count on the menu goes down.



- 1 Reply by email opens a new email in your own email program, with the customer's note quoted.
- 2 Call, with the number. It works on a phone, or on a computer that can place calls.
- 3 What the customer wrote.
- 4 Who sent it, how to reach them, what it was about and which page of the website they were on.
- 5 Mark as new puts the message back on your to-do pile.
- 6 The trash button deletes it.

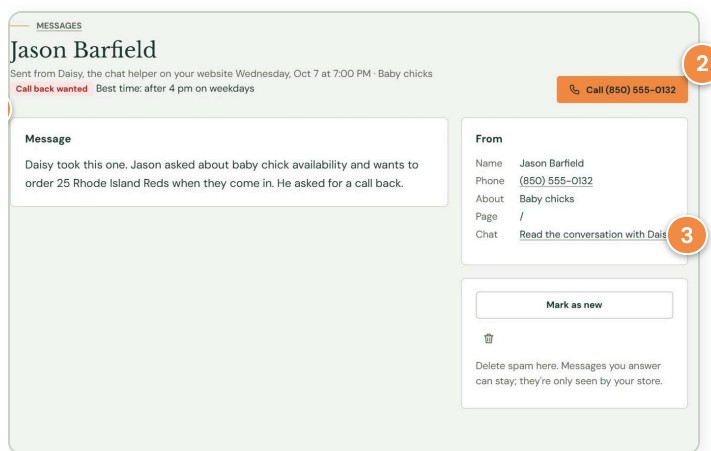
One message.

Roadside does not send your reply. **Reply by email** opens your own email program, and the answer goes out from there, so Roadside does not keep a record that you answered. If you want to come back to a message, press **Mark as new** and it returns to the unread list. A note with no email address, only a phone number, has no Reply button, just the Call button.

Deleting is the only way to clear a message. Roadside asks first (*Delete this message? This can't be undone.*), and the message is then gone from Roadside. The copy in your email inbox stays. There is no spam folder and no Replied tag; messages you have answered can stay in the list, and only your store sees them.

Call-back requests

A visitor can ask the website assistant to have the store call them. The note then carries a red **Call back wanted** tag and, when the visitor said so, the best time to call. The phone number is required for these, because the assistant asks for it.

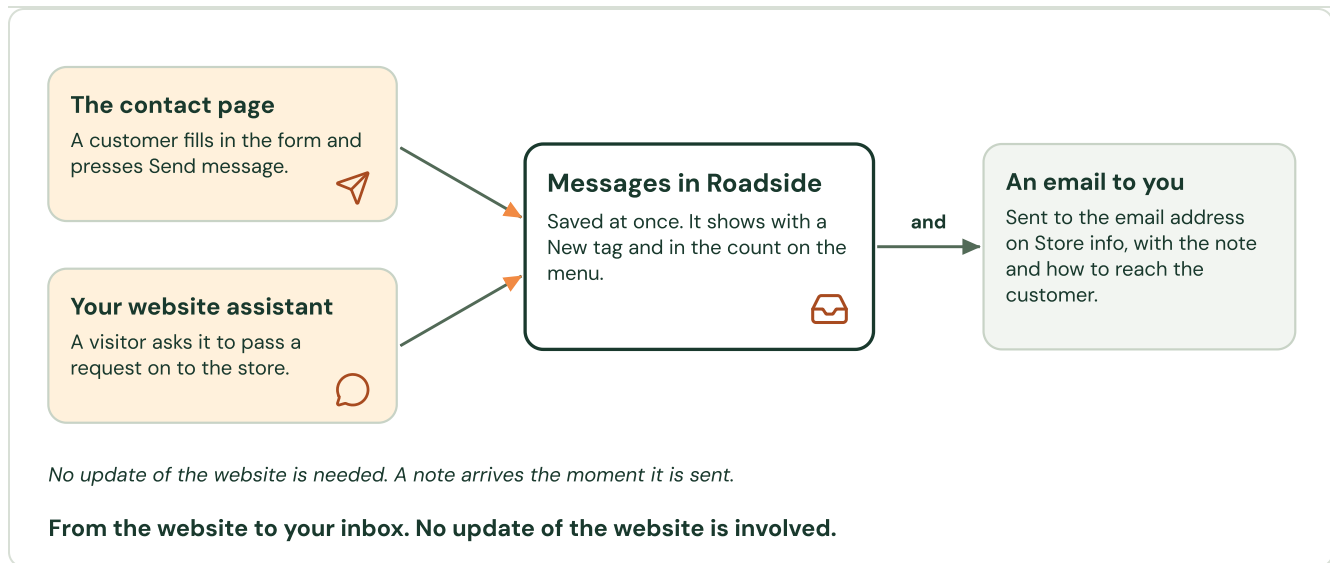


- 1 The tag and the best time.
- 2 Call, with the number. There is no email on this one, so there is no Reply button.
- 3 Opens the conversation the visitor had with the assistant.

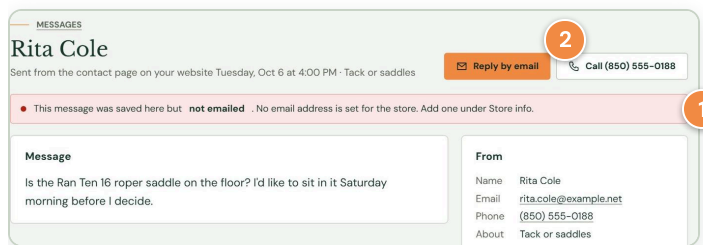
A message from the assistant that asks for a call back.

Where each message goes

Every note is saved in Messages the moment it arrives. Roadside also emails it to the address you keep on Store info. That email carries the same words and ends with a link back to the message in Roadside. The subject line reads like *Website message from Marcus Reed, Message from Daisy: Jason Barfield* or *Call back wanted: Jason Barfield (850) 555-0132*.



When the email to you did not go out, the row gets a **Not emailed** tag and the message page explains why in a red note. The note is still in Messages, so nothing is lost.



- 1 The reason the email did not go. This one says there is no store email address.
- 2 The customer's own email still works for a reply.

A message that was saved but not emailed.

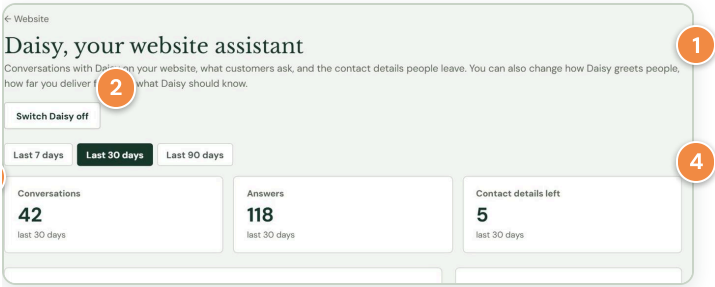
The usual reason is that Store info has no email address. Type one there (Chapter 3, Hours, closed days and contact details (page 18)) and later notes will be emailed. If the note says email is not switched on for your Roadside, or that the email did not go out, write to **support@dirtyroadsoftware.com** and tell us which message it was.

The website assistant

This appears when your plan includes it. The assistant is a chat helper on your website, run by Dirt Road. Visitors open it from a chat button, and on a phone also from the call bar. It is an AI assistant, which means a computer program that answers questions in ordinary sentences. It is not a person. The sample store's is named Daisy, so this chapter's pictures say Daisy. Yours has the name Dirt Road gave it.

The assistant answers from what your store has told it about products, prices, hours, delivery and baby chicks. Visitors are told not to type a card number or a password into the chat. A visitor can also ask it to pass a request to the store. The visitor ticks a box and presses send first, and may choose to send the conversation along. The request lands in Messages with a **Daisy** tag.

The Assistant screen shows you what the assistant has been doing and lets you change a few things. Store owners and Managers can both read the conversations and change the settings. Dirt Road looks after the rest: how it talks, what it knows about your products, the look of the chat and its daily allowance. The screen says so, and you ask Dirt Road for any of those.



- 1 The assistant's name.
- 2 Switch Daisy off, or on.
- 3 The period for the lists below: 7, 30 or 90 days.
- 4 Conversations, answers and contact details left, for the last 30 days.

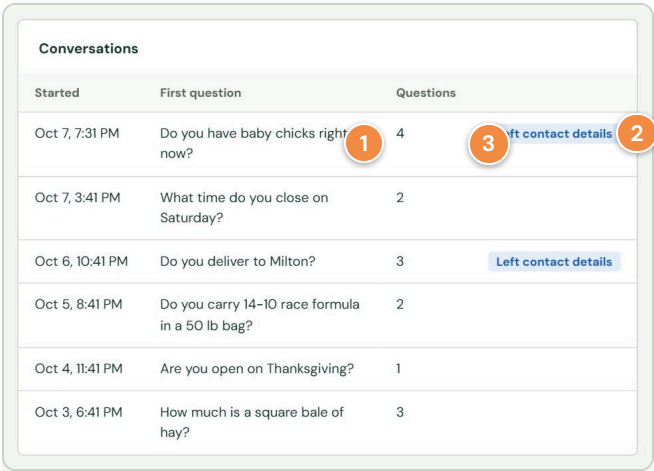
The top of the Assistant screen.

Switch it off or on

The button at the top turns the assistant off for everyone on your website. Roadside asks first: the chat leaves your website within a minute or two, until you switch it back on. While it is off, the screen says so. When you switch it on again, it shows on the website within a minute or two. Nothing needs an update of the website.

Conversations, questions and contact details

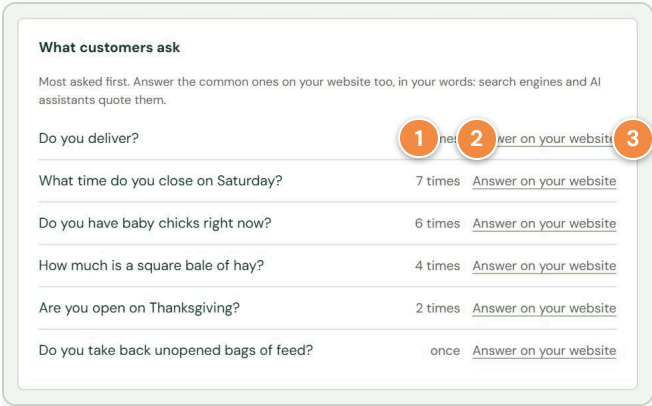
Three lists show what customers did. Choose a period at the top to change how far back they look. The three numbers always cover the last 30 days.



- 1 The first question. Press it to read the whole conversation.
- 2 Left contact details: the visitor gave a name and a way to reach them.
- 3 How many questions the visitor asked.

The Conversations list.

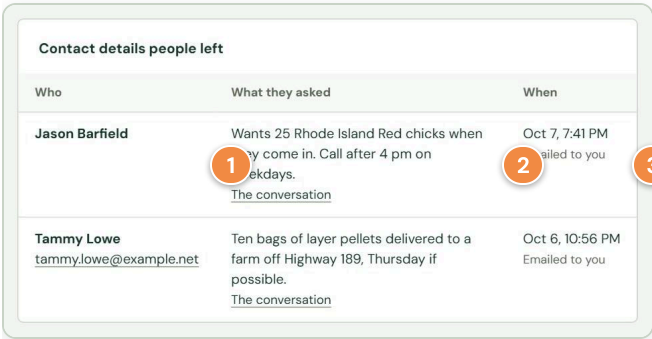
A conversation page shows the chat turn by turn, each turn marked **Visitor** or **Assistant**, with the contact details the visitor left beside it. Phone numbers and similar details are hidden before conversations are kept. The Contact details people left list on the Assistant screen shows what visitors chose to leave you.



- 1 A question visitors asked, most asked first.
- 2 How many times they asked it.
- 3 Answer on your website opens Questions & answers with this question already typed in.

What customers ask.

What customers ask is a list of the questions to answer on your website, in your own words (Questions and answers, in Chapter 6 (page 42)). The same screen lists the contact details people left.



- 1 The name, and the email address when one was given.
- 2 What they asked for, and a link to the conversation.
- 3 When they left it. Emailed to you means a message went to your store email too.

Contact details people left.

What you can change

The box beside the lists has three settings and a **Save** button. A save takes effect within a minute or two, and Roadside says so.

Free delivery radius. Inside it, the assistant tells people yes, you deliver there for free. Outside it, it tells them to call. Distance is measured in a straight line from your store's map location, so set that on Store info first (Chapter 3, Hours, closed days and contact details (page 18)). Type 0 if the assistant should never say yes on its own. Your online store has its own delivery rules, which decide what checkout charges (Chapter 17, Store settings (page 118)). This radius changes only what the assistant says, so keep the two the same.

What the assistant should know. Short notes in plain words: a closing, what just came in, what you do not carry. Closed Thanksgiving Day and hay is in at \$9 a square bale are the kind of thing that fits. These notes win over anything else the assistant knows, so take an old one out when it stops being true.

Greeting

Hi, I'm Daisy, the helper on the Baker Feed website. Ask me about feed, hours, delivery or baby chicks.

The first thing Daisy says when someone opens the chat.

Free delivery radius (miles)

10

Inside it, Daisy tells people yes, you deliver there free; outside it, to call. Measured in a straight line from your store's map location.

What Daisy should know

Closed Thanksgiving Day.
Square hay bales are in: \$9 each.

Short notes in plain words: closings, what just came in, what you don't carry. These win over anything else Daisy knows.

Save

1

2

3

4

- 1 Greeting: the first thing the assistant says when someone opens the chat. Up to 500 characters.
- 2 Free delivery radius, in miles.
- 3 What the assistant should know. Up to 2,000 characters.
- 4 Save.

The settings you control.

If the assistant's information cannot be loaded, the screen shows one sentence in place of the lists. Some say Dirt Road has to check something on its side, and you write to **support@dirtroadsoftware.com**. A sentence that says the conversations could not be reached just now means you can try again in a minute.

6 Reviews, and questions and answers

Reviews shows your Google and Facebook ratings and a handful of kind words from real customers. Questions & answers lets you answer what people ask at the counter, in your own words, on the pages you choose.

IN THIS CHAPTER

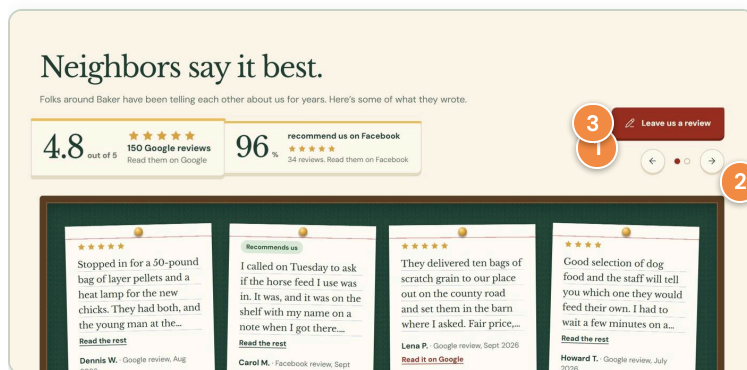
- Typing in your Google and Facebook ratings
- Choosing reviews to feature
- Writing questions and answers
- Choosing which pages show each answer
- Answers that keep your hours and phone number current

Your ratings on Google and Facebook

WHERE TO FIND IT  Website  Reviews

Store owner, Manager

Roadside does not look up your ratings. You copy the numbers from Google and Facebook and type them in, and your website shows them next to the reviews you pick. When the numbers on Google or Facebook change, change them here. The ratings sit near the top of the reviews section on your home page, with a button for customers who want to leave one. Store owners and Managers can both change Reviews.



- 1 Your Google rating and Facebook figure, each linking to your page there.
- 2 The reviews you picked, each with the reviewer's first name and last initial.
- 3 The button for a customer who wants to write one.

The reviews section on the home page of the website.

The Google card takes four things. The Facebook card has the same, except that Facebook shows a percentage who recommend a business instead of stars.

Google
Your star rating and number of reviews from your Google Business Profile. For the review link, use "Ask for reviews" in your Business Profile and copy the link it gives you.

Rating (out of 5)
4.8

Number of reviews
150

Link to your reviews
<https://share.google/kQot6iaBMjZ7WhTtO>

Link for leaving a review
<https://share.google/Z9zdGT4b7USZNlbFD>

- 1 Rating out of 5, like 4.8. A number from 1 to 5.
- 2 Number of reviews.
- 3 Link to your reviews.
- 4 Link for leaving a review.

The Google card.

In your Google Business Profile, use **Ask for reviews** to get the link customers use to write a review, and copy it into **Link for leaving a review**. Both links have to start with `https://`.

Facebook
Facebook shows a "recommend" percentage instead of stars, like 96% from 34 reviews. Both links can be your page's Reviews tab.

Recommend (%)
96

Number of reviews
34

Link to your reviews
<https://www.facebook.com/BakerFeedandCountryStore/reviews>

Link for leaving a review
<https://www.facebook.com/BakerFeedandCountryStore/reviews>

- 1 Recommend (%), a number from 0 to 100, like 96.
- 2 Number of reviews.
- 3 Link to your reviews. Your page's Reviews tab works.
- 4 Link for leaving a review. The same address works here.

The Facebook card.

Google shows on your website only when it has a number of reviews above zero and a rating. Facebook needs a number of reviews above zero and a recommend percentage. When both are filled in, the website says *4.8 out of 5 from 150 Google reviews* or *96% recommend us, from 34 Facebook reviews*. If you do not use one of them, leave its boxes empty.

Reviews to feature

Below the two cards is a list of reviews to show on the website, up to 12, in the order you give them. Three empty rows follow the saved ones for adding more. Leave a quote empty and its row is skipped.

Review 1

Stopped in for a 50-pound bag of layer pellets and a heat lamp for the new chicks. They had both, and the young man at the counter carried the bag out to the truck.

Name
Dennis W.

Where
Google

Stars
5

Date
August 2026

Link to the review
<https://example.net/reviews/baker-feed/1>

☐ Take this review off the website

- 1 The review, up to 700 characters. Copy the part worth showing.
- 2 The reviewer's name.
- 3 Where it was written: Google or Facebook.
- 4 The stars, or None.
- 5 The month it was written.
- 6 A link to the review itself.
- 7 Take this review off the website. It appears only on reviews already saved.

One featured review.

The website shows each reviewer by first name and the first letter of their last name, so a name typed as Teresa Jones appears as Teresa J., whatever you type. It shows no photo, and each review links back to where it was written. Spaces and line breaks in a quote run together into one paragraph. A name and a place (Google or Facebook) are required for every review you fill in. The stars, date and link are optional.

Pick reviews that say something specific: the help at the counter, a delivery, a feed that worked, your hours. They reassure someone who has not been in yet, and the words customers use help search engines connect your store with what people are looking for.

Save reviews

Where this shows

Your website's reviews section, the call-ahead ordering section of your shop page, and your /review page, the short address to put on receipts, the counter sign and texts.

Choosing reviews

Pick ones that say something specific: the help at the counter, delivery, a feed that worked, the hours. They reassure new customers, and the words people use help search engines match your store to what people search for.

Answer every review on Google and Facebook, good or bad.

- 1 Save reviews saves both cards and the list together.
- 2 Where they show: the reviews section, the call-ahead section of your Shop page, and your Leave a review page.

Save reviews, and where the reviews show.

The Leave a review page has its own short address, `/review` on your website, which you can print on receipts, a counter sign or a text. Roadside tells you if something is wrong and saves nothing until it is fixed.

IF ROADSIDE SAYS	IT MEANS
Google's rating is a number from 1 to 5, like 4.8.	What you typed is not a number from 1 to 5. Facebook has a matching line for its percentage: a number from 0 to 100.
Google's link to the reviews must start with https://.	One of the four links was typed without it, or is not a web address. The line names which one.
Review 3 is longer than 700 characters. Shorten it to the part worth showing.	Cut the quote down.
Choose where review 3 was written. Add the name of whoever wrote review 3.	A review needs both. The number is the position in the list.
Feature up to 12 reviews.	Take some off before adding more.

After a good save, your website shows the change with the next update, a few minutes later (Chapter 8, How your changes reach the website (page 49)).

Questions and answers

WHERE TO FIND IT



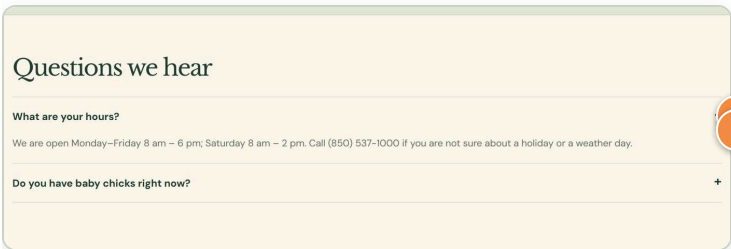
Website



Questions & answers

Store owner, Manager

Customers ask the same things over and over: do you deliver, what time do you close, where are you. Write the questions and your answers once, choose where they show, and your website lists them on those pages. Search engines and AI assistants, which are the chat programs people ask for answers, can quote what you write when someone asks the same thing. Store owners and Managers can both change Questions & answers.



1

A question. A customer presses it to open the answer.

2

Your answer, as you wrote it.

Questions we hear, on the home page of the website.

The page lists your questions in the order you give, up to 40. The list has three empty blocks at the end for new ones. Fill in both the question and the answer, or leave both empty. A question can be up to 200 characters and an answer up to 1,500.

Question 1

What are your hours?

Answer

We are open {hours}. Call {phone} if you are not sure about a holiday or a weather day.

Show it on

☒ Home page ☐ Shop ☒ Contact ☐ Feed delivery ☐ Order ahead
☐ Our story ☐ Privacy ☐ Leave a review
☐ Delete this question

- 1 The question, as a customer would ask it.
- 2 Your answer. A sentence or two, with the facts first.
- 3 Show it on: tick each page that should list this question.
- 4 Delete this question. It appears on questions already saved.

One question.

Show it on offers the Home page, Shop and Contact, and the pages your website's design has of its own. The sample store's are Feed delivery, Order ahead, Our story, Privacy and Leave a review. A question that has no page ticked is saved but appears nowhere. Press **Save questions** when you are done.

Use the questions people ask at the counter, on the phone and in the chat on your website, in the words they use. Answer in a sentence or two, with the facts first.

Answers that keep your details current

An answer can name your hours, phone number, address or email without you typing them. Write the word in curly brackets, like `{hours}`, and Roadside puts in whatever Store info holds on the day the page is made.

Answers that stay current

Write these in an answer and your website puts in the current details from Store info:

{hours} 1 the store hours

{phone} 2 the phone number

{address} 3 the address

{email} 4 the email address

- 1 The days you are open and your hours, with days that share the same times grouped together.
- 2 The phone number.
- 3 The address on one line.
- 4 The email address.

The four details an answer can use.

Here is an answer that stays right on its own: *We are open {hours}. Call {phone} if you are not sure about a holiday or a weather day.* When you change a time on Store info (Chapter 3, Hours, closed days and contact details (page 18)), the next update puts it into every answer that uses it. Type the curly brackets and the word exactly as shown, with no spaces inside.

The assistant’s screen links to this one. Beside each question a customer asked the assistant, **Answer on your website** opens Questions & answers with that question already typed into the first empty block (The website assistant, in Chapter 5 (page 35)).

 GOOD TO KNOW

Do not put a web address, or a note about where a fact came from, in round brackets inside an answer or a review. Roadside holds back the whole update when it finds one. What can stop an update, in Chapter 8 (page 55) has the rule and examples.

IF ROADSIDE SAYS	IT MEANS
Question 2 needs both the question and its answer.	One of the two boxes is empty.
Question 2 is too long: questions up to 200 characters, answers up to 1500.	Shorten the question or the answer.
Up to 40 questions. Take some off before adding more.	Tick Delete this question on the ones you no longer need.

7

Old links

An old link is an address people saved, printed or found on Google before your website changed. This screen tells your website where each one goes now, so nobody lands on a missing page.

IN THIS CHAPTER

- What an old link is, and why it matters
- What Roadside already covers for you
- Add an old link
- Change or remove one
- Moved for good, for now, or gone

What happens to an old address

WHERE TO FIND IT  **Website** ›  **Old links**

Store owner, Manager

Your old website had pages like `/about-us`. The new one has `/about`. A flyer, a bookmark or a search result may still send a customer to the old address, and without help that customer sees a page that is not there. An old link fixes it: the website sees the old address and sends the visitor to the new one.

WORDS TO KNOW

Redirect

An instruction that sends a visitor from one web address to another. Roadside calls each one an old link. An address here means the part after your website's name, like `/about-us`.

Roadside already covers every product and department address from your old website, the old shop pages, and products that were merged or renamed. Add an old link only when someone tells you a link lands nowhere, or a search result does. Store owners and Managers can both add, change and remove old links.

The list runs from A to Z. The **Goes to** column shows the new address. A line that says **Its product is gone** or **Its department is gone** in a warning tag means the product or department an old link pointed to no longer exists; change that link or remove it. A tag that says **not on the website** means the page it goes to is not shown on your website now.

Old link	Goes to	Added by	Used	Actions
/about-us	1 about	You	—	Change
/hay-hauling	Gone (410)	2 You	—	Change
/old-shop/... and everything under it	/shop	You	—	Change
/product-category/feed/bird	/shop/poultry	You	1x · Oct 3	5 Change
/product-category/feed/supplements-and-minerals	/shop/supplements	The move from the old website	4	Change
/spring-sale	/shop/feed for now	6 You	—	Change

- 1 Old link: the address people still use.
- 2 Gone (410): this address has no new home.
- 3 A line under the address says it covers everything under it too.
- 4 Added by: you, or something Roadside did when your website moved or a product changed.
- 5 Used: how many times the link worked, and the last date. A dash means Roadside has not counted a visit.
- 6 For now: a link that is only temporary.

The Old links list, trimmed here to one of each kind of row.

Add an old link

The form beside the list adds one. Type the old address, say where it goes now and press **Add**.

Add an old link

Old link

Goes to

An address on your website. A product's or a department's address keeps working if it is renamed later.

How

☐ everything under this address too

Add

- 1 Old link. Required, up to 500 characters.
- 2 Goes to. An address on your website, starting with a slash.
- 3 How: Moved for good (301), For now (302), or Gone, nothing replaces it (410).
- 4 Tick this to cover everything under the address too.
- 5 Add.

The Add an old link form.

- 1 **Type the old link.** You may paste the whole web address; only the part after your website's name counts. Capital letters and a slash at the end do not matter, so `/About-Us/` and `about-us` are the same link. It cannot have a question mark or a hash sign in it.
- 2 **Type where it goes.** It has to be an address on your website, starting with a slash, like `/shop/feed` or `/product/triple-crown-senior`. If you paste an address that starts with your website's name, Roadside trims it for you. You do not need this box for a Gone link.
- 3 **Choose how it moved.** The table below says which to pick.
- 4 **Tick the box to include everything under the address** when a whole branch moved. A link for `/blog` then also covers `/blog/anything`.
- 5 **Press Add.** Roadside saves the link and tells you when your website will start using it: with the next update, a few minutes later (Chapter 8, How your changes reach the website (page 49)).

If you save a link for an address that is already on the list, the new one replaces the old.

CHOOSE	WHEN	WHAT SEARCH ENGINES DO
Moved for good (301)	The page has a new home and the old address is retired. This is the usual choice.	They learn the new address and stop sending people to the old one.
For now (302)	A short-term stand-in, such as a sale page that is only up for the month.	They keep the old address in their lists, because you will want it back.
Gone, nothing replaces it (410)	A page for something you stopped offering, such as hay hauling.	They drop it, instead of looking for a new page.

 WORDS TO KNOW

301, 302 and 410

The numbers are codes a website sends along with a page, and they tell browsers and search engines what happened to it. Roadside puts them in plain words, and you only choose the words.

IF ROADSIDE SAYS	IT MEANS
Which old link is this? Something like /product-category/feed/ or /about-us/.	The Old link box is empty.
An old link can't have a ? or # part; the part before it is what gets redirected.	Take the question mark or hash sign and what follows off the old link.
Plain letters, numbers, dashes and slashes, up to 500 characters.	The old link has a space or an odd character.
Where should it go? An address on your website, starting with /, like /shop/feed or /product/triple-crown-senior.	Goes to is empty or does not start with a slash.
That's the same address. Send it somewhere else, or remove the redirect.	The old link and the new address are one and the same.

Change or remove one

Press **Change** at the end of a row. The page opens with the old link at the top, how often it has been used and the same four fields. Fix what is wrong and press **Save**. If you change the Old link itself, the row takes its new name. **Cancel** goes back to the list.

The screenshot shows the 'OLD LINKS' form. At the top, it displays the current old link '/spring-sale' and its status 'Not used yet.' Below this are four input fields: 'Old link' (containing '/spring-sale'), 'Goes to' (containing '/shop/feed'), 'How' (a dropdown menu set to 'For now (302)'), and a checkbox for 'Everything under this address too'. A 'Save' button is at the bottom. A 'Remove it' button with a trash icon is on the right. Numbered callouts are: 1 points to the 'Old link' field, 2 points to the 'How' dropdown, 3 points to the 'Save' button, and 4 points to the 'Remove it' button.

- 1 The same fields as the form on the list.
- 2 How it is answered.
- 3 Save.
- 4 The trash button removes it, after asking you to confirm.

The page for one old link.

Removing a link means the address answers like any other address that is not on your website. Do that when you added a link by mistake. Changes to old links reach your website with the next update, so allow a few minutes.

8

How your changes reach the website

When you press Save, Roadside has your change at once. Your website follows a few minutes later, after Roadside rebuilds its pages and puts the changed ones on the live site. This chapter shows how that works and how to see where a change is.

IN THIS CHAPTER

- What happens between Save and your website
- Which changes go live at once and which wait
- The Publishing tile on Website home
- The search check
- Pausing and resuming publishing
- What can stop an update, and what to do

From Save to your website

Customers never see Roadside. They see your website, which is a set of finished pages. When you save something that shows on a page, Roadside makes the affected pages again from everything you have saved, checks them, and puts the ones that changed on the website. Roadside's own screens show your change the moment you save it. The website is the part that waits.

WORDS TO KNOW

Publish

Roadside rebuilding your website's pages from what you have saved and putting the changed ones on the website. This manual also says *update*. The screens say *publish*.

Live

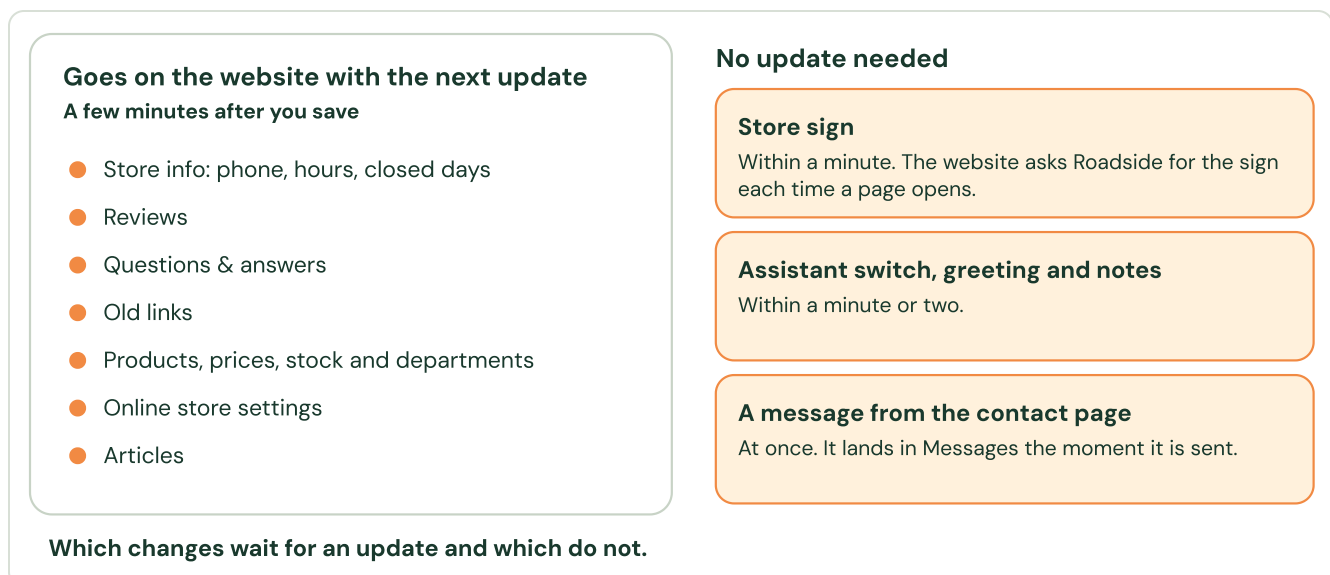
What customers see on your website right now.



The wait of about a minute is on purpose. If you change a price, a photo and your Saturday hours one after another, those three saves become one update instead of three. Roadside also checks for itself every few minutes and starts an update when something differs from the last one, so your website does not depend on anyone remembering to press anything. In all, a change usually reaches the website in a few minutes.

What goes live at once, and what waits

Most of what you save in Roadside is part of the pages, so it travels with the next update. A few things are live sooner because the website asks Roadside for them each time it needs them.



WHAT YOU DO	WHEN CUSTOMERS SEE IT
Change Store info: phone, hours, closed days, links	With the next update, a few minutes.
Save Reviews, Questions & answers or Old links	With the next update, a few minutes.
Change a product, a price, stock or a department	With the next update, a few minutes.
Change online store settings, or publish an article	With the next update, a few minutes.
Put up or take down the Store sign	Within a minute. No update.
Switch the website assistant on or off, or change its greeting or notes	Within a minute or two. No update.
A customer sends a message from the contact page	At once, in Messages.
Send Dirt Road a website change request	Not an update. It goes to us (Chapter 24, Website changes (page 194)).

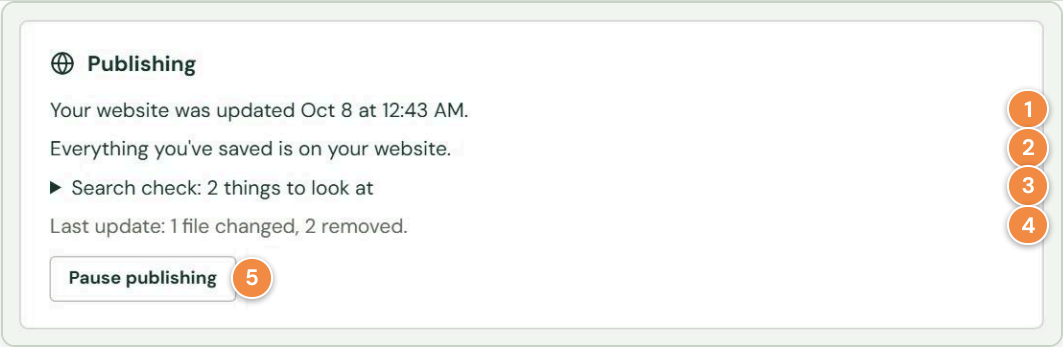
The note in the corner after a save tells you which case you are in. For Store info, Reviews, Questions & answers and Old links it says *Saved. Your website updates on the next publish, in a few minutes.*

The Publishing tile

WHERE TO FIND IT  **Website** ›  **Website home**

Store owner, Manager

Website home has a Publishing tile that shows where your changes are. It appears when your website is published from Roadside. If you see no Publishing tile, Dirt Road updates your website another way, and support can tell you how. A Store owner and a Manager both see it. Staff do not.



- 1 When the website was last updated. It is the last finished update, not the last time anyone saved.

2 Where your changes stand.

3 The search check, covered below.
- 4 How much the last update changed. A file is one page, photo or other piece of the website.

5 Pause publishing holds updates back until you resume them.

The tile when everything you saved is on the website.

THE TILE SAYS	IT MEANS
Everything you've saved is on your website.	The website matches what you have saved.
Changes you saved are being prepared.	You have saved something the website does not have yet. It is on its way.
Publishing is paused. Changes you save wait until you resume it.	Updates are on hold, until you press Resume publishing.
The last publish stopped: and then a sentence	Roadside found a problem and left the website as it was. The section What can stop an update, below, says what to do.
Your website hasn't been published from Roadside yet.	The first update has not run. If you are not expecting that, write to support@dirtyroadsoftware.com.



- 1 Changes you saved are being prepared.

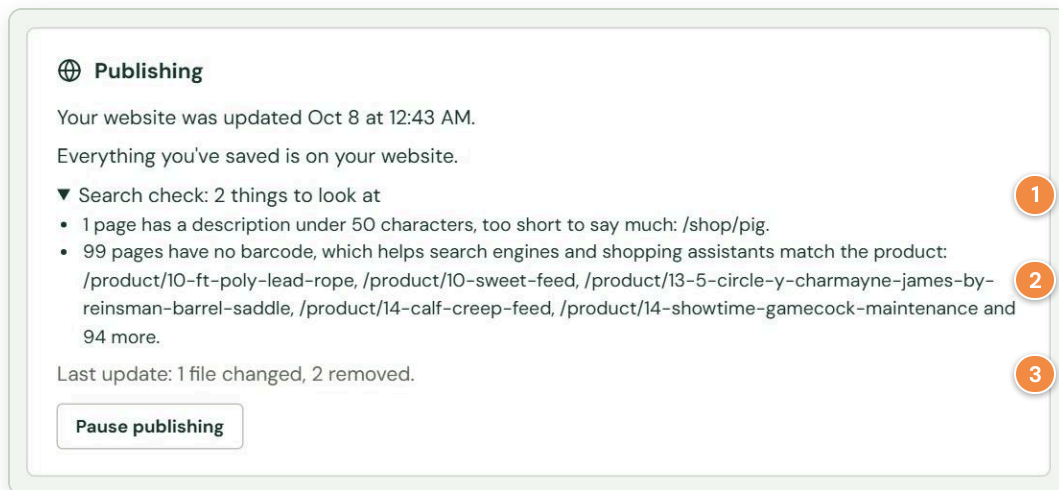
The tile a moment after a save.

💡 GOOD TO KNOW

To check that a change is live, look at the tile. Your website was updated at a time after your save, and the line below it says everything is on your website. Then open the page. If you still see the old version, reload it, because your browser may be holding a copy.

The search check

Each update also checks your pages the way a search engine reads them, and the tile lists what it finds under **Search check**. Press the line to open the list. If everything looks right, the tile says so. The check never stops an update. It is a short list of things to look at.



- 1** The number of things to look at. Press it to fold the list open or shut.
- 2** Each line says how many pages, what is wrong, and names up to five of them.
- 3** The size of the last update.

The search check, opened.

📖 WORDS TO KNOW

Alt text

A sentence that describes a photo for people who cannot see it. Search engines read it too.

Structured data

Facts about your store and each product, such as your address, hours and prices, written so that search engines and AI assistants can read them.

THE CHECK SAYS	WHAT IT MEANS AND WHAT TO DO
No barcode	A product has no barcode, which helps search engines and shopping assistants match it. Add the barcode to the product's size (Chapter 11, Sizes, prices and photos (page 74)).
Photos without alt text	Add a sentence about what the photo shows, on the product's photo (Chapter 11, Sizes, prices and photos (page 74)).
The same title or description as another page	Two pages would look alike in search results. Two products with the same name can cause it.
No title, a title over 65 characters, no description, a description over 160 characters or under 50	Search results cut long ones off and say little for short ones. Send us the page as a website change (Chapter 24, Website changes (page 194)).
No main heading, or more than one	The page has no single main heading. Send it to us as a website change.
No canonical address, structured data that does not parse, no store details, no product details, or questions the page does not show word for word	Behind-the-scenes details that help search engines. These belong to Dirt Road, so write to support@dirtyroadsoftware.com with the line the tile shows.

Pause and resume publishing

Pausing holds back every update until you resume. Your website keeps showing the last version it has. Pause when you want a run of changes to go up together, and resume when you are done.

- 1 Press Pause publishing on the tile.** Your browser asks you to confirm: *Pause publishing for Baker Feed & Country Store? Changes you save wait until you resume it.*
- 2 Make your changes.** Roadside keeps building the pages, so the tile can say what is waiting, but nothing goes to the website.
- 3 Press Resume publishing.** Roadside says *Publishing is on again.* and starts an update, which reaches the website in a few minutes.



- 1 The paused line.
- 2 Resume publishing.

The tile while publishing is paused.

 CAREFUL

Pausing holds back everything, not only the change you were thinking of. Phone numbers and hours wait, and so do prices, stock levels and articles. A store that pauses and forgets will show old prices and old stock to customers. Resume as soon as you are done. The Store sign and messages from the contact page are not affected by a pause.

What can stop an update

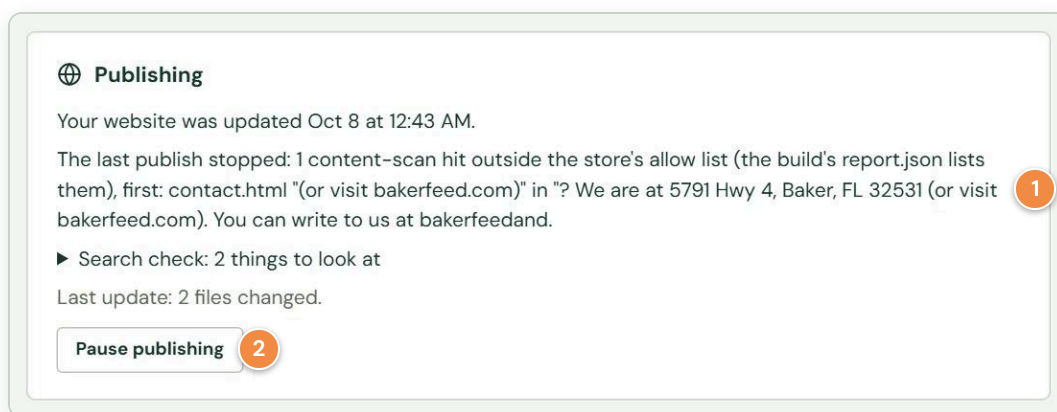
Before Roadside puts new pages on the website, it reads all the text customers will see. That includes what you typed in Store info, Reviews and Questions & answers, and product names, descriptions, photo descriptions and article text. It looks for leftover notes to yourself, or notes about where a fact came from. If it finds one, it stops the update and your website keeps its last version.

The rule is short: **do not put a web address, or a note about where something came from, inside round brackets.** These examples would stop an update.

STOPS AN UPDATE	PASSES
Call us (or visit www.bakerfeed.com)	Call us, or visit www.bakerfeed.com
Order ahead (bakerfeed.com/order)	Order ahead at bakerfeed.com/order
Fortified with vitamins (source: the label)	Fortified with vitamins, as the label says
Crude protein 14% (per the manufacturer)	Crude protein 14%
Good for layers (via Purina)	Good for layers

In round brackets, these start a note that stops an update: *source* or *sources* (when not followed by *of*), *via*, *according to*, and *from* or *per* followed by the label, the manufacturer, the website or the site. A bracket that holds a web address does the same, whether it starts with *http* or *www.* or has *.com* in it.

Three more stop an update wherever they appear: *other_text*, *older_label* and *site*; the way a search for one website is typed into Google. A bracket that only describes an ingredient, like (source of vitamin B6), is fine.



- 1 The sentence is written for us. The part for you is the page it names and the words it quotes.
- 2 Everything else on the tile is as usual.

The tile after an update stopped. Someone put a web address in round brackets in an answer on the contact page.

- 1 **Read the sentence on the tile.** It names a page, such as `contact.html` for the contact page, and quotes the words it did not like.
- 2 **Find those words where you typed them.** A contact page answer is in Questions & answers. A product page is in the product. The Store info note is under your hours.
- 3 **Take the brackets, or the web address inside them, out, and save.** The save starts a new update, and the tile moves back to *Everything you've saved is on your website.* when it is through.

If the tile says the last publish stopped and the sentence does not point at words you typed, the fix is ours. Write to **support@dirtyroadsoftware.com** and paste the sentence the tile shows, along with what you saved just before. Your website stays up on its last version while we look.



PART 3

Products

What you sell, how it is priced, how it looks online and how much is on the shelf.

9 Finding your way around products

Products is where you see everything you sell, what each item costs, how many are on the shelf and whether customers can see it on the website. This chapter covers the list, the product page, and the departments and brands that sort it all.

IN THIS CHAPTER

- The Products list, search and filters
- The stock chart and Top sellers
- The product page, which you read before you edit
- Departments and categories
- Brands
- What decides whether a product is on the website

The Products list

WHERE TO FIND IT **Inventory** ›  **Products**

Store owner, Manager, Staff

Every product is one row, in order from A to Z, 50 to a page. A row shows the cover photo, the name, and a grey line with the brand, the size and the SKU. To the right come the department, the price, how many are on hand and whether the product is on the website. Press a name to open the product.

WORDS TO KNOW

Product

One thing you sell, with a page of its own on the website. ShowTime 27/20 is one product even though it comes in two bags.

Size

One way a product is sold: a 50 lb bag, a 20 lb bag, a gallon jug. Each size has its own price and its own count on the shelf. A product sold only one way has one size, and customers never see a choice.

SKU

Your own item number for a size. Leave it empty on a new product and Roadside makes one for you.

The search box looks at product names, brand names, SKUs, barcodes and sizes. It does not look inside descriptions. The list shortens as you type, and the count under the heading changes with it. Beside the box are a department list, a brand list (once you have a brand) and a stock list: **Any stock level**, **Low on stock** or **Out of stock**. They work together, so Poultry and Low on stock shows only the poultry products running short. Tick **Archived** to see archived products instead of active ones.

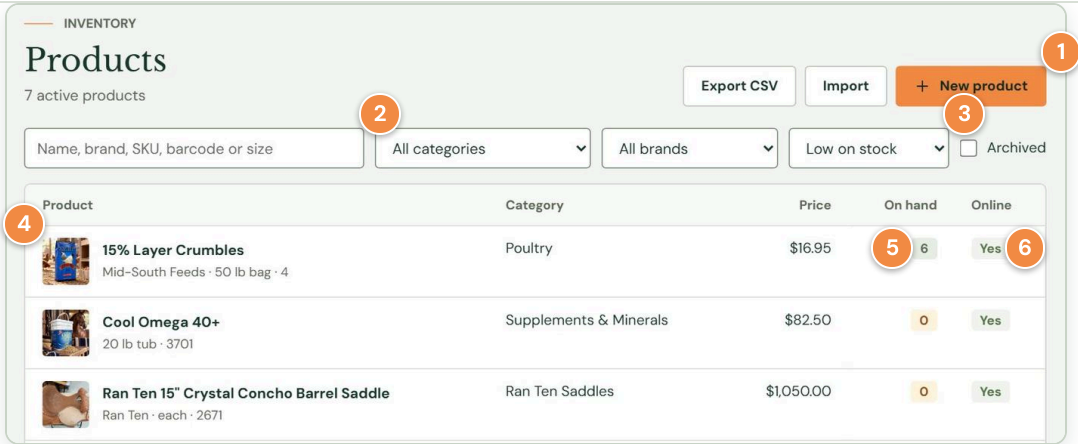
The **On hand** column shows a number, or *Not tracked* when Roadside does not count that product. A number at or under its reorder point gets a badge, which turns orange at zero. **Low on stock** includes products at zero. **Online** says Yes when the product is for sale and not hidden. A Discontinued product says No even while it is still on the website. Treat the column as the place to start looking: the last section of this chapter lists everything that has to be true.

CAREFUL

Price and On hand show a product's first size only. A product with a 50 lb bag and a 20 lb bag lists the 50 lb bag's price and count, and the two stock filters look at the first size too. Open the product to see every size.

WHO CAN DO WHAT

A Manager has the same Products screens as the Store owner and can do everything in this chapter. Staff can look at every product and record stock, but cannot add, edit, archive or import products, and Categories and Brands are not in their menu. A Read only person can look and cannot change anything.



- 1 Export CSV, Import and New product. Staff see only Export CSV.

2 Search by name, brand, SKU, barcode or size.

3 The filters. Department, brand and stock level work together.
- 4 The cover photo, the name, and the brand, size and SKU.

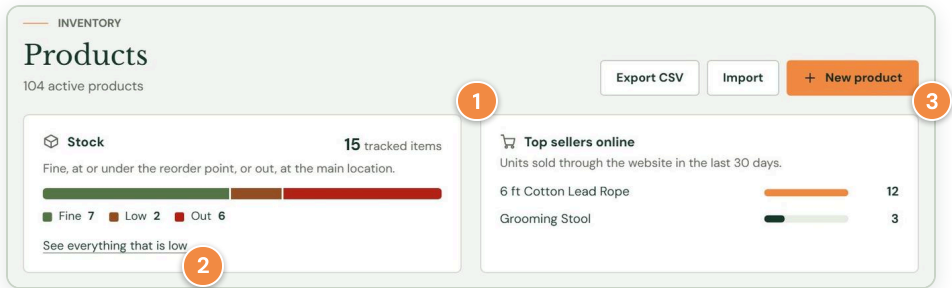
5 A count at or under its reorder point gets a badge.

6 Whether the product is on the website.

The Products list, filtered to what is low on stock.

The stock chart and Top sellers

When you count some of your stock, or customers have bought something on the website, two cards sit above the list. They show on the plain first page of the list and step aside once you search, filter or turn the page.



- 1 Every counted size, sorted into Fine, Low and Out.

2 Opens the list filtered to what is low or out.
- 3 The six products customers bought most through the website.

The two cards above the list.

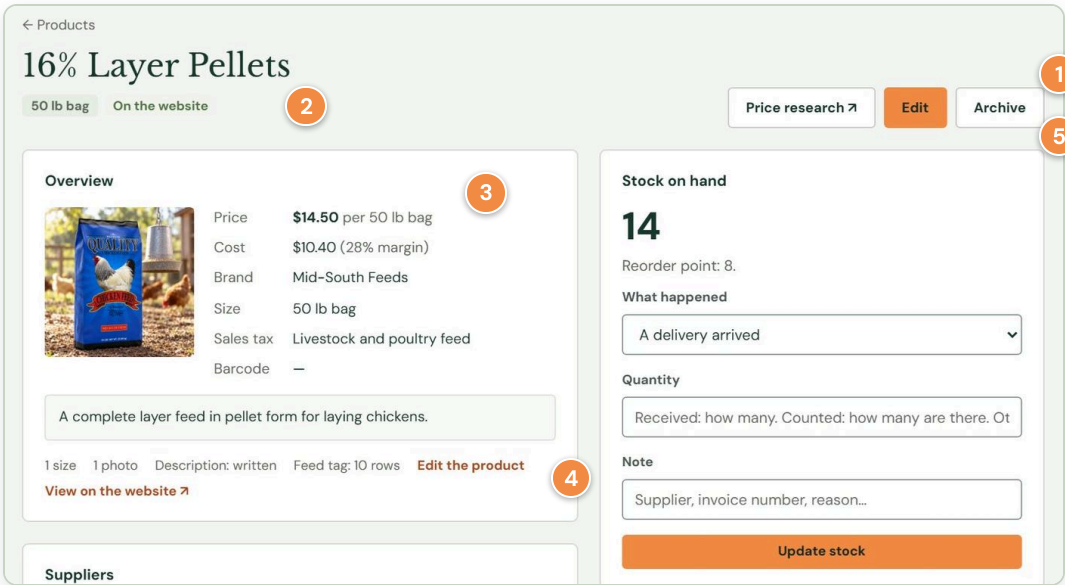
The **Stock** card counts every size Roadside keeps a count for, in products that are for sale. A size is *Low* when its count is at or under its reorder point, *Out* at zero and *Fine* otherwise. Chapter 13, Stock (page 90) explains how the counts change. **Top sellers online** lists the units sold through the website in the last 30 days. It appears when your store takes orders online, your role can see orders and something has sold.

The product page

WHERE TO FIND IT **Inventory** ›  **Products**

Store owner, Manager, Staff

Pressing a product's name opens its page. The page is for reading: price, cost, suppliers, stock and what has changed. You change things in the editor, which the **Edit** button opens. Chapter 10, Add or edit a product (page 66) covers it.



- 1

Price research, Edit and Archive.
- 2

The first size, and whether customers can see the product.
- 3

Price, cost and margin, brand, size, sales tax and barcode.
- 4

What the product has, with links to edit it and to see it on the website.
- 5

How many are on hand, and the form to change the count.

The page for 16% Layer Pellets.

Overview is the card on the left. For a one-size product the price line reads *\$14.50 per 50 lb bag*. For several sizes it reads as a range, *\$17.75 to \$38.00 by size*, and Cost and Barcode say *By size*. **Margin** is what is left of the price after the cost, as a percent of the price, and it shows once you have entered a cost. Under the facts are the summary and a line counting the product's sizes and photos.

Below Overview are **Suppliers** and **Stock history**, covered in Chapter 13, Stock (page 90). On the right, under **Stock on hand**, **Price history** lists the last 25 changes to price or cost, newest first, with the date, where the change came from (Edited, Import, Supplier cost) and who made it. For a product with several sizes it does not say which size changed. **Visits to its page** and **Recent online orders** appear too when there is something to show.

Price research opens a web shopping search for the product's brand, name and size in a new tab, so you can see what others charge. **Archive** takes the product off the lists and the website and keeps its history. Roadside asks first. For what restoring an archived product does, see Archive and restore, in Chapter 10 (page 73).

 CAREFUL

Cost and margin show to everyone who can open Products, and the exported spreadsheet has a Cost column. If a role should not see what you pay, check who has Products access in Chapter 26, Your team and what each role can do (page 211).

Departments and categories

WHERE TO FIND IT **Inventory** ›  **Categories**

Store owner, Manager

Categories sort your products, for you and for the website. Every product sits in one category.

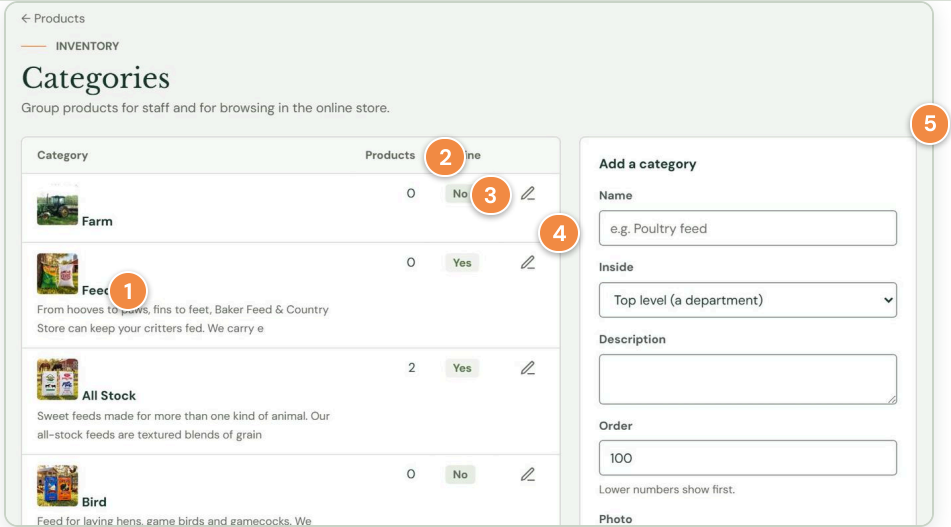
 WORDS TO KNOW

Department

A category at the top level, such as Feed or Tack. Customers meet departments as the main groups of your shop.

Subcategory

A category inside a department, such as Poultry or Horse inside Feed.



- 1

A category's name. Press it to see its products.
- 2

Products filed directly in the category.
- 3

Whether the category shows on the website.
- 4

Edit the category.
- 5

Add a department or a subcategory.

Categories, with the Add a category card on the right.

Departments come first, with their subcategories listed under them. The **Products** column counts the products filed directly in a category, so a department often shows 0 when its products sit in its subcategories. The pencil opens the category's form in place of its row. The **Add a category** card has the same fields.

FIELD	WHAT IT DOES
Name	Required, up to 120 characters.
Inside	Choose <i>Top level (a department)</i> , or the department it belongs in.
Description	On the sample store's website the first paragraph leads the department's page. Paragraphs after a blank line appear lower down.
Order	A number from 0 to 9999, set to 100 for a new category. Lower numbers show first.
Photo	A JPEG, PNG or WebP up to 6 MB for the category's card on the website. Without one, a product's photo is used.
Show in the online store	Ticked for a new category. See the warning below.

Press **Save** and Roadside says *Category saved*. **Remove category**, at the bottom of the form, asks first. Its products stay with no category, and its subcategories move up one level.

⚠ CAREFUL

When **Show in the online store** is off, the category's page, its card and every product filed directly in it leave the website at the next update. The products stay in Roadside, and they return when you turn the box back on. A product with no category still shows, but under no department.

A category's web address comes from the first name you give it and stays the same when you rename it, so renaming is safe. Remove a category and add it again and the new one gets a new address.

Brands

WHERE TO FIND IT **Inventory** › **Brands**

Store owner, Manager

A brand is the maker: Mid-South Feeds, Tribute, Ran Ten. It shows above the product's name on the website and gives you a filter on the Products list. The screen has the same shape as Categories, a list on the left and an **Add a brand** card on the right. A brand has a **Name** and a **Website**. Type the website the short way, such as `purinamills.com`, and Roadside adds the `https://`. **Remove brand** asks first and leaves its products with no brand.

Roadside refuses a second brand spelled almost like one you have (capitals, spaces and punctuation do not count) and names the one it matched. When you rename a brand, it remembers the old spelling, so a later import or Fetch with AI still finds it.

What decides whether a product is on the website

A product is on your website when all of these are true:

- It is not archived.
- Its **Website** setting is *On the website* or *In the store only*, not *Hidden*.
- Its **Status** is *For sale*, or *Discontinued* with some left in stock.
- Its category is shown in the online store, or it has no category.

Status and Website are two settings in the product's editor. For how they combine, see Website: what customers see, in Chapter 10 (page 70). A product that meets all four conditions and is still missing from the website after a few minutes is worth a note to **support@dirtyroadsoftware.com**. Send the product's name and we will look.

Customers see a product's price, its photos and whether it is in stock. They never see your cost, your supplier, your reorder point or an exact count. A change you save reaches the website in a few minutes, and Chapter 8, How your changes reach the website (page 49) explains how.

10 Add or edit a product

Everything about one product lives on one screen, the editor. This chapter shows how to add a product, what each part of the editor does, how the two settings that decide what customers see work together, and the jobs you will do most often.

IN THIS CHAPTER

- Adding a product
- The editor, section by section
- Two ways of saving
- What customers see: Status and Website
- Taking a product off the website
- Changing a price, and running a sale
- Hiding a department
- Archiving and restoring

Add a product

WHERE TO FIND IT **Inventory** ›  **Products** › **New product**

Store owner, Manager

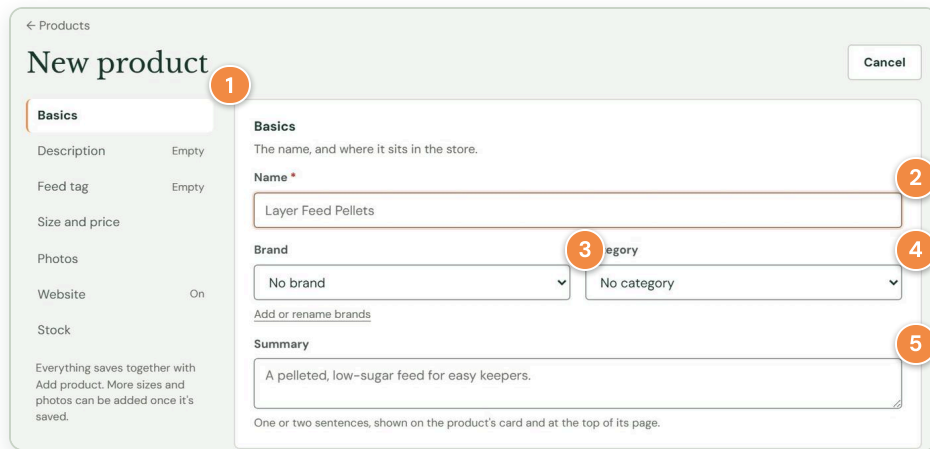
Press **New product** at the top of the Products list. The orange **New** button at the top of every screen has a **Product** choice that opens the same form. A new product asks for its first size and price on the same screen. You can add more sizes and photos once it is saved.

- 1 Name it.** Type the name the way customers say it, such as *ShowTime 27/20*. Choose the brand and the category, and write a summary.
- 2 Describe it.** The description can wait. Chapter 12, Descriptions, feed tags and Fetch with AI (page 82) covers it, and the Feed tag for feed products.
- 3 Give it a size and a price.** In **Size and price**, type the amount (*50*), choose the unit (*lb*) and what it is sold as (*bag*). Then type the price. Chapter 11, Sizes, prices and photos (page 74) covers cost, SKU, barcode and sales tax.
- 4 Choose the first photo.** Pick a JPEG, PNG or WebP file from the computer or phone.
- 5 Decide whether it goes on the website.** In **Website**, leave Status at *For sale* and Website at *On the website* to put it up at the next update, or change them to keep it private for now.

- 6 **Set up the stock.** In **Stock**, leave **Track stock on hand** ticked and type how many are on the shelf and the reorder point. Untick it for something you do not count.
- 7 **Press Add product.** Roadside says *Product added. Add more sizes and photos here, or choose Done.* and opens the editor for the new product.

CAREFUL

A new product starts as *For sale* and *On the website*, with stock counting on and nothing on hand. At the next update the website lists it as *Out of stock right now*, and nobody can buy it until you give it some stock or turn counting off. If you are not ready, set Status to *Draft* before you press Add product.



The screenshot shows the 'New product' form. On the left is a sidebar with sections: Basics, Description, Feed tag, Size and price, Photos, Website, and Stock. The 'Basics' section is active. The main form has the following fields: 'Name' (required, with a red asterisk), 'Brand' (dropdown), 'Category' (dropdown), and 'Summary' (text area). Numbered callouts point to: 1. The sidebar sections; 2. The 'Name' field; 3. The 'Brand' dropdown; 4. The 'Category' dropdown; 5. The 'Summary' text area.

- 1 The sections of the form. A word beside a section says what is in it, or that it is empty.
- 2 The name customers will see. This is the one required box in Basics.
- 3 The maker. Press Add or rename brands to change your list.
- 4 The category the product is filed in.
- 5 One or two sentences for the product's card.

A blank New product screen.

The editor, section by section

WHERE TO FIND IT **Inventory** >  **Products** > **Edit**

Store owner, Manager

Open a product and press **Edit** to reach the same form with the product filled in. The heading follows the name as you type it. Under it sit three small badges: whether the product is on the website, how many sizes it has and how many photos. **View on the website** appears when the product is shown to

customers. For a product you have just added it reads *Publishing to your website...* until its page is live, which takes a few minutes. **Done** leaves the editor.

The menu down the left side jumps to a section. Sections that other parts of Roadside add, such as Feed tag, sit in the same list.

SECTION	WHAT IT HOLDS	COVERED IN
Basics	Name, brand, category and summary.	This chapter
Description	The "About this product" text.	Chapter 12, Descriptions, feed tags and Fetch with AI (page 82)
Feed tag	Guaranteed analysis, ingredients and feeding statement, for feed products.	Chapter 12, Descriptions, feed tags and Fetch with AI (page 82)
Sizes and prices	Each size with its price, cost, SKU and barcode, and the sales tax class.	Chapter 11, Sizes, prices and photos (page 74)
Photos	Up to five photos, the cover first.	Chapter 11, Sizes, prices and photos (page 74)
Website	Status, Website setting, and how the product reads in a search result.	This chapter
Stock	Whether each size is counted, and its reorder point.	Chapter 13, Stock (page 90)
Price Watch	Other stores' prices for the same item. Appears when your plan includes it.	Chapter 15, Compliance watch and Pricing check (page 102)

In **Basics**, the name can be up to 160 characters, and two products may share a name. The brand list is the one you keep under Inventory, Brands. The category list shows every category in one flat list: choose the most specific one, such as Poultry, because it decides which department page the product appears on. A product sits in one category.

A product's web address is made from its name on the day you add it. Renaming the product later does not change the address, so customers' bookmarks keep working.

Two ways of saving

This is the part of the editor that catches people. Most of the form waits for **Save product**. Sizes and Photos do not.

Save product

One button at the bottom of the screen. It saves these together, and keeps none of them if one is refused.

Basics

Description

Feed tag

Website

Stock

Sales tax

Saved as you go

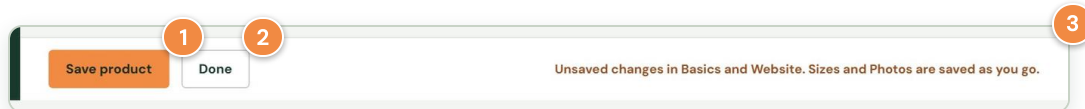
Each button saves the moment you press it, and the page reloads. The card says Saved as you go.

Sizes and prices

Photos

Save size, Add size, Remove, Add photo,
Make the cover, Approve, Remove

What waits for Save product, and what saves at once.



- 1 Saves everything you have typed in the sections that wait.
- 2 Leaves the editor. It does not save.
- 3 Which sections have changes that are not saved.

The bar at the bottom of the editor, after typing in Basics and Website.

Save product keeps your changes in Basics, Description, Feed tag, Website, Stock and Sales tax together. If Roadside refuses any one of them, it keeps none, and a red note under the heading says why. What you typed stays on the screen so you can fix it. After a good save the screen says *Saved*. and stays open.

Sizes and prices and **Photos** are lists. Every button in them saves the moment you press it (**Save size**, **Add photo**, **Make the cover** and the rest), and the page reloads to that card. Those two cards carry the tag *Saved as you go*. Sales tax is the exception: it sits at the bottom of Sizes and prices but waits for Save product.

If you have typed in another section and then press a button in Sizes or Photos, Roadside warns you first: *Your changes in Basics aren't saved yet. Saving this now drops them. Go ahead?* Press **Cancel**, press **Save product**, then go back to the button. If you try to leave the editor with unsaved changes, your browser asks whether to leave the site.

GOOD TO KNOW

Roadside does not warn you when two people edit the same product at the same time. Whoever presses Save product last keeps their version. At a busy time, agree who is working on a product.

Website: what customers see

Two settings in the **Website** section decide whether customers see a product and whether they can buy it online. They are separate on purpose.

Status says where the product is in its life. *Draft* is not ready: it is not for sale and not on the website. *For sale* is the normal state. *Discontinued* means you are not reordering it. A discontinued product stays on the website while there is stock to sell, and drops off when the last one goes. If you do not count its stock, it stays until you change something. *Archived* is not on the list: you archive a product from its own page, as described at the end of this chapter.

Website says how the product appears. *On the website* shows it and, when your store takes orders online and a size is in stock, lets customers add it to the cart. *In the store only* shows it for information, with no Add to cart. Customers can read about it and call. *Hidden* keeps it off the website.

Status	Website setting		
	On the website	In the store only	Hidden
For sale	Shown Customers can add it to the cart.	Shown No Add to cart. Customers can call.	Not shown Still in Roadside.
Discontinued	Shown while in stock Add to cart works until it runs out.	Shown while in stock No Add to cart. Customers can call.	Not shown Still in Roadside.
Draft	Not shown, whatever the Website setting says		

An archived product is never shown. Neither is a product in a category that is switched off in Categories.

What customers see for each pair of settings.

Website

Whether it's for sale and shown on the website, and how it reads in a search result.

Status

For sale

On the website

Search title

Southern Supreme Mare & Foal 16/7 horse feed

44 / 60

Search description

A textured horse feed with 16% protein and 7% fat for weanlings, yearlings and broodmares. Pick it up at Baker Feed & Country Store.

132 / 160

How it reads in a search result

Southern Supreme Mare & Foal 16/7 horse feed

A textured horse feed with 16% protein and 7% fat for weanlings, yearlings and broodmares. Pick it up at Baker Feed & Country Store.

Left empty, the website uses the name and the summary. Search engines show about 60 and 160 characters.

- 1

Draft, For sale or Discontinued.
- 2

On the website, In the store only or Hidden.
- 3

The headline in a search result. About 60 characters show.
- 4

How the title and description will read.

The Website section, with a search title and description typed in.

The green *On the website* badge under the editor's heading means customers can see the product. It shows for In the store only products too. On the Products list, the Online column says Yes for the same products.

Search title and search description

These two boxes are for search engines such as Google. The title is the blue headline of a search result and the description is the grey text under it. Leave both empty and the website uses the product's name and its summary. Roadside counts characters beside each box. Search engines show about 60 characters of the title and about 160 of the description, and the rest is cut off. The preview underneath shows what you have typed.

Take a product off the website

YOU WANT	DO THIS
To hide it for now and keep everything	Edit the product. In Website, set Website to <i>Hidden</i> (or Status to <i>Draft</i>). Press Save product . Set it back when you are ready.

YOU WANT	DO THIS
To sell what is left, then drop it	Set Status to <i>Discontinued</i> and press Save product . It stays on the website while stock lasts and drops off when it runs out. This only works if you count its stock.
To retire it for good	Open the product page and press Archive . History stays, and you can restore it later.
To hide a whole department	Turn off Show in the online store on the category. The next section has the steps.

The website changes at the next update, a few minutes after you save. Chapter 8, How your changes reach the website (page 49) explains why. The product stays in your lists. Hidden and Draft products show *No* in the Online column, and so do Discontinued ones, even while they are still on the website.

Change a price, and run a sale

WHERE TO FIND IT **Inventory** ›  **Products** › **Edit** › **Sizes and prices**

Store owner, Manager

- 1 Open the product and press Edit.** Go to **Sizes and prices**.
- 2 Press Change** on the size's row. A small form opens with the size's price, cost, SKU and barcode.
- 3 Type the new price in Price (\$).** Change **Cost (\$)** too if what you pay has changed.
- 4 Press Save size.** Roadside says *Size saved*. This saves at once. You do not need Save product.

The product page's **Price history** card now shows the new price with the date and your name. The website picks up the change at the next update.

Roadside has no separate sale price. A sale is a lower price: change it when the sale starts and change it back when it ends. The website shows only the current price, with no crossed-out old one. Price history keeps each change with its date, so you can see what the regular price was. To change many prices at once, see Chapter 14, Importing and exporting products (page 97).

Hide a department

WHERE TO FIND IT **Inventory** ›  **Categories**

Store owner, Manager

- 1 Go to Inventory, Categories.** Press the pencil on the department's row.
- 2 Untick Show in the online store.**
- 3 Press Save.** Roadside says *Category saved*.

At the next update the department's page, its card and every product filed directly in it leave the website. The products stay in Roadside. Tick the box again to bring them back.

CAREFUL

Each category has its own switch. Turning off a department does not turn off the subcategories inside it, and products filed in a subcategory follow that subcategory's switch. To take Feed and everything in it off the website, open each subcategory too. The Online column on the Categories screen shows what is on and off.

Archive and restore

WHERE TO FIND IT **Inventory** ›  **Products** › **product page**

Store owner, Manager

Roadside has no delete for products. Archive is how you retire one: it takes the product out of the lists and off the website and keeps its sales, stock and price history. Open the product page and press **Archive**. Roadside asks *Archive this product? It will be hidden from lists and the online store*. After you agree it says *Product archived*.

Archived products show on the Products list when you tick **Archived**. Open one and press **Restore** to bring it back. Restore asks nothing and says *Product restored*.

CAREFUL

Restoring sets the product's Status to *For sale*, whatever it was before archiving. If you wanted it off the website, open Edit afterwards and set Website to *Hidden* or Status to *Draft* before the next update.

Staff do not see the Edit, New product or Archive buttons. A Manager sees everything described here.

11 Sizes, prices and photos

A size is one way a product is sold, and the size carries the price. Photos belong to the product as a whole. This chapter covers adding a second bag size, every price and code field, the sales tax class, and the five photos a product can have.

IN THIS CHAPTER

- How a product, its sizes and its photos fit together
- Changing a size's price, cost and codes
- Adding a second size
- SKU, barcode and part number
- Sales tax class
- Cover photo, order and alt text
- Photos for one size, and photos waiting for approval

How a product, its sizes and its photos fit together

A product is the thing on the shelf that customers ask for by name. It has a name, a summary, a description and a spot in your departments. A product always has at least one size. A product sold only one way has a single size, and customers never see a choice. A product sold two ways, such as a 50 lb bag and a 20 lb bag, has two sizes, and the website asks the customer which one.

The product: ShowTime 27/20

Name, brand, category and summary. Description and feed tag. Status and Website setting. Sales tax class. Search title and description.

Sizes: one or more

Each size has its own price, cost, SKU, barcode and count.

50 lb bag (the default)

\$38.00, cost \$31.20, SKU 13, 11 on hand

20 lb bag

\$17.75, cost \$14.60, SKU 3307, 3 on hand

Photos: up to five

The first is the cover. A photo shows for every size, or for one.

1 Front of the bag (cover)

Every size

2 Back of the bag

Every size

3 The 20 lb bag in use

The 20 lb bag only

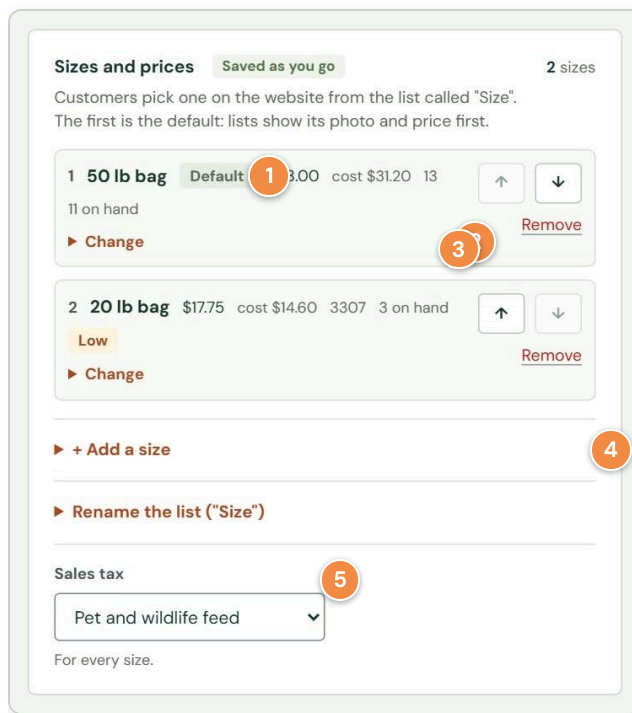
One product, its sizes and its photos.

Change a size's price, cost and codes

WHERE TO FIND IT **Inventory** ›  **Products** › **Edit** › **Sizes and prices**

Store owner, Manager

The Store owner and Managers can change sizes, prices and photos. Staff can look at them but see no Edit button. Open a product and press **Edit**, then go to **Sizes and prices**. Each size is one row with its name, price, cost, SKU and count, and a *Low* badge when the count is at or under its reorder point. Each row saves on its own.



Sizes and prices Saved as you go 2 sizes

Customers pick one on the website from the list called "Size".
The first is the default: lists show its photo and price first.

1	50 lb bag	Default	1	\$3.00	cost \$31.20	13	↑	↓	Remove	
11 on hand										
▶ Change										
2	20 lb bag			\$17.75	cost \$14.60	3307	3 on hand	↑	↓	Remove
Low										
▶ Change										
▶ + Add a size										
▶ Rename the list ("Size")										
Sales tax										
Pet and wildlife feed										
For every size.										

- 1 The first size is the default. Lists and cards show its price and photo first.
- 2 Opens the form to change this size.
- 3 Move the size up or down, or remove it. These show once a product has more than one size.
- 4 Opens the form to add another size.
- 5 The sales tax class, for every size.

Sizes and prices for ShowTime 27/20, which comes in two sizes.

Press **Change** and the form opens under the row. Press **Save size** and Roadside says *Size saved*. Nothing in this form waits for **Save product**.

WORDS TO KNOW

Cost

What you pay for the size. Customers never see it.

Margin

What is left of the price after the cost, as a percent of the price. A \$14.50 bag that costs \$10.40 has a 28% margin. The product page shows it once you have entered a cost.

▼ Change

Name customers pick

50 lb bag

Leave it empty to use the size below, like "40 lb bag".

Size

Amount

50

Unit

lb

Sold as

bag

Price (\$) *

38.00

Post (\$)

31.20

SKU

13

Barcode

Part number

The maker's item number

Save size

- 1 What customers pick on the website. This box appears once a product has two sizes.
- 2 Amount, unit and what it is sold as. Together they make the size text, like 50 lb bag.
- 3 The price customers pay. Required.
- 4 What you pay. Optional.
- 5 Your item number. Leave it as it is, or type another.
- 6 Saves this size at once.

The Change form for the 50 lb bag.

The **Size** boxes build the size text. Type an amount, choose a unit and choose what it is sold as, and you get *50 lb bag*, *1 gal jug* or *each*. Units run from lb, oz, tons, kg and g, through gal, qt, pt, fl oz, L, mL, cc and cu ft, to ft, in, yd and ct for a count. **Sold as** offers each, bag, bale, bucket, jug, tub, case and more. If you type an amount, choose a unit too. **Price (\$)** is required. Type it like 22.50. A dollar sign and commas are fine, and 0 is allowed for something you do not sell. If Roadside cannot read it, it says *Price must be an amount like 22.50*.

Every change to price or cost goes into **Price history** on the product page, with the date and your name. The website shows a new price at the next update, a few minutes after you save.

Add a second size

WHERE TO FIND IT

Inventory ›  Products › Edit › Sizes and prices

Store owner, Manager

This is how to add a 25 lb bag to 16% Layer Pellets, which is set up with one size. The steps are the same for any second size on any product.

▼ + Add a size

What do you call the size it has now? **1** What the website calls the choices **2**

50 lb bag Size

Name customers pick **3**

40 lb bag, Large, Red

Leave it empty to use the size below, like "40 lb bag".

Size

Amount	Unit	Sold as
40	lb	bag

Price (\$) * **4** Cost (\$)

22.50 What you pay the supplier

SKU Barcode

Made for you when empty

Part number

- 1** First time only: what to call the size the product has now.
- 2** First time only: what the website calls the choice. Size, Color or Scent.
- 3** The new size's name, as customers will pick it.
- 4** The new size's price. Cost, SKU, barcode and part number come after it.

The Add a size form on a product that has one size so far.

- 1** Open the product, press Edit and go to Sizes and prices. Press + Add a size.
- 2** Name the size the product has now, if Roadside asks. Type *50 lb bag* in **What do you call the size it has now?** Leave **What the website calls the choices** as *Size*, or type *Color* or *Scent* if that is what customers choose between.
- 3** Name the new size. Type *25 lb bag* in **Name customers pick**. If you leave it empty, Roadside builds the name from the amount, unit and package below it.
- 4** Fill in the price. Cost, SKU, barcode and part number are optional. An empty SKU gets one made for you.
- 5** Set the stock. **Track stock on hand** is ticked. Type how many you have in **On hand now** and the **Reorder point**, or untick it. Chapter 13, Stock (page 90) covers both.
- 6** Press **Add size**. Roadside says *Size added*. The product page on the website now shows a Size choice, and cards show *From* and the lowest price when the sizes cost different amounts.

Roadside will not add a second size with the same name as one the product already has. It says *This product already has a size called "25 lb bag"*.

The arrows beside a row move that size up or down, and the first size is the default. **Remove** asks *Remove this size? Its sales and stock history are kept*. A product must keep at least one size: removing the last one is refused, and Roadside suggests archiving the product instead. Add a removed size back

later under the same name and its history comes back with it. **Rename the list**, under the sizes, changes what the website calls the choices.

 GOOD TO KNOW

A few products came from a manufacturer file with two lists of choices, such as size and color. For those, the card says so. You can still change each size's price and details, but adding or renaming the choices is a job for Dirt Road. Write to **support@dirtyroadsoftware.com** with the product's name.

SKU, barcode and part number

The three codes sit on each size, and none of them is required.

 WORDS TO KNOW

SKU

Your own item number for the size. It must be different for every size in the store.

Barcode

The 8, 12, 13 or 14 digits printed under the bars on the bag. Some call it the UPC.

Part number

The maker's own item number for the product, which is not the same as your SKU.

FIELD	RULES
SKU	Roadside capitalizes it and removes spaces. Up to 50 characters. Empty on a new size gets one made for you, such as <i>P00042</i> . You cannot blank it later: empty keeps the current one. <i>Another product already uses the SKU</i> means it is taken.
Barcode	8, 12, 13 or 14 digits. Spaces and dashes are ignored. Roadside checks the last digit and says <i>That barcode's last digit doesn't check out. Type it again from the label.</i> if it is wrong. Each barcode belongs to one size. If your plan includes Pricing check, it uses the barcode to find the same item at other stores.
Part number	Up to 70 characters. Pricing check uses it too.

Sales tax class

The **Sales tax** list sits at the bottom of the Sizes and prices card. It names how checkout taxes the product, for every size. A standard store has *Taxable* and *Not taxed*. The sample store's list adds classes that fit Florida, such as *Livestock and poultry feed*, *Pet and wildlife feed*, *Animal health (farm use)* and *Seed*. Choose the one that describes the product. If you are unsure which class an item belongs in, ask your accountant, because Roadside does not choose for you. If a class you need is missing, write to support@dirtyroadsoftware.com.

CAREFUL

The sales tax class is the one setting in this card that waits for **Save product**. Choose it, then press Save product at the bottom of the screen.

Photos

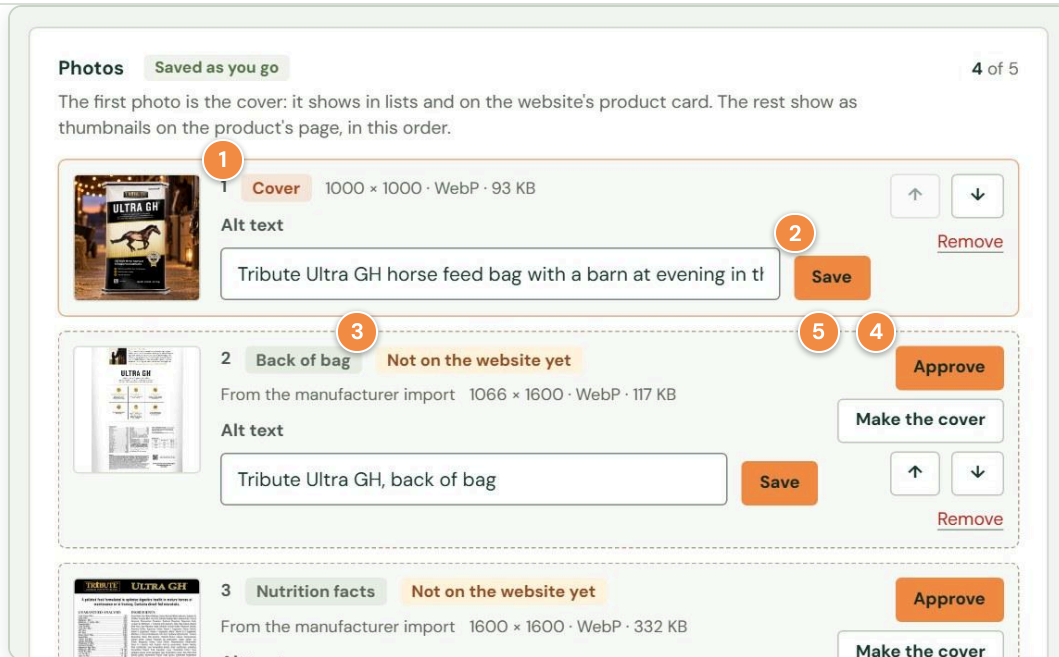
WHERE TO FIND IT **Inventory** ›  **Products** › **Edit** › **Photos**

Store owner, Manager

A product holds up to five photos. The first is the **cover**: it shows in the Products list and on the website's product card. The rest show as small pictures on the product's page, in the order you set. A product with no photo shows a plain placeholder.



Daylight at the feed room door makes a clean bag photo.



- 1 The cover, which is always the first photo.
- 2 Alt text: what the photo shows, in plain words.
- 3 A photo from a manufacturer file that is not on the website yet.
- 4 Approve puts the photo on the website.
- 5 Make the cover, move up or down, or remove.

Photos for Tribute Ultra GH. The cover is on the website. Two more are waiting for approval.

📖 WORDS TO KNOW

Alt text

A sentence that describes a photo for people who cannot see it. A screen reader reads it aloud, and search engines read it to learn what the photo shows.

To add a photo, choose the file under **Add a photo**, type the alt text and press **Add photo**. Roadside says *Photo added*. The first photo you add becomes the cover. The picture must be a JPEG, PNG or WebP file under 6 MB.

On each photo's row, **Make the cover** moves it to the front, the arrows change its place, and **Remove** takes it off the product after asking. When the cover is removed, the next photo becomes the cover. Changing the alt text and pressing the row's **Save** says *Photo saved*. Every one of these buttons works at once.

Write alt text the way you would describe the picture to someone on the phone: *Front of a 50 lb bag of 16% Layer Pellets*. Skip *photo of* and *image of*. Alt text is shown to customers and read by search engines, so it follows the wording rules in Words that stop the website from updating, in Chapter 12 (page 89).

If a photo is refused

ROADSIDE SAYS	WHAT TO DO
Upload a JPEG, PNG or WebP photo.	The file is another kind, or the picture is more than 8,000 pixels on a side. A phone's HEIC pictures land here. On an iPhone, set Settings, Camera, Formats to Most Compatible, or email the picture to yourself first.
That photo is larger than 6 MB.	Use a smaller copy. Most phones can send a medium size.
That photo is already on this product.	The same picture is on the product already.
A product has up to 5 photos. Remove one to add another.	Remove a photo you no longer need.

Photos for one size

On a product with more than one size, each photo has a **Shows for** list. It starts at *Every size*. Choose one size and press **Save** to show that photo only when a customer picks that size. A grooming stool in purple, blue and black can have one photo per color. If a size is removed later, its photos go back to *Every size*.

Photos waiting for approval

When Dirt Road loads a maker's official photos for you, the extras arrive marked **Not on the website yet**, with the note *From the manufacturer import*. They do not show on the website, and they are never the cover in the list, until you approve them. Look at each one, then press **Approve**. Roadside says *Photo approved. It shows on the website*. A product can arrive with more than five photos. Roadside then says how many came with it, shows them all and asks you to remove some to get down to five before you add your own.

12 Descriptions, feed tags and Fetch with AI

A product page tells customers what the product is and what is in the bag. This chapter covers the description box, the Feed tag for feed products, Fetch with AI when your plan includes it, and the wording rule that can hold back a website update.

IN THIS CHAPTER

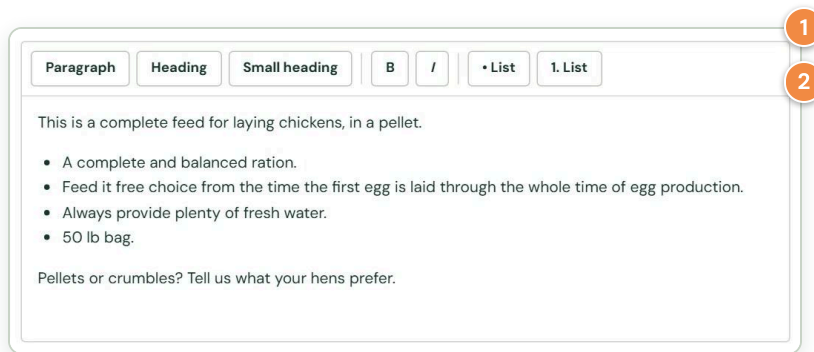
- The summary and the description
- What the website adds under the description
- The Feed tag: analysis, ingredients and feeding statement
- How the website shows the headline numbers
- Fetch with AI
- Words that stop the website from updating

The summary and the description

WHERE TO FIND IT **Inventory** ›  **Products** › **Edit** › **Description**

Store owner, Manager

The Store owner and Managers can edit descriptions and feed tags. Staff and Read only people can read them on the product page. A product has two pieces of writing. The **summary** is one or two sentences in Basics. It shows on the product's card in lists and at the top of its page. The **description** is the longer "About this product" text further down the page. The Description card suggests what to put there: what the product is, who it is for and how to use it.



1 Headings, bold, italic and lists.

2 Type or paste here.

The Description box for 16% Layer Pellets.

The box takes paragraphs, two sizes of heading, bold, italic, and bullet or numbered lists. It has no button for links, pictures or tables. When you paste, only the plain words come in. Formatting from Word or a web page is dropped on purpose, so a pasted page never brings its fonts and colors with it. Press **Save product** to keep what you wrote.

Write it the way you would answer a customer at the counter: what it is, what it is for, which animals eat it. Do not type the guaranteed analysis or the ingredients here. The next section says why.

What the website adds under the description

Below your description the product page prints more, by itself. Typing the same things in the description would show them twice.

- An **At a glance** table, and extra sections such as feeding charts.
- The **Guaranteed analysis** table and the **Ingredients** list, from the Feed tag section.
- **Feeding directions**, or a **Label statement** when the text reads as a statement, from the Feed tag section.
- **Cautions**.

You can edit what comes from the Feed tag. The At a glance table, the extra sections and the Cautions come from the maker's information that Dirt Road loaded for you, and they have no edit screen. If one of them is wrong, write to **support@dirtyroadsoftware.com** with the product's name and what it should say.

The Feed tag

WHERE TO FIND IT **Inventory** ›  **Products** › **Edit** › **Feed tag**

Store owner, Manager

The Feed tag section is where a feed product's bag label goes: the guaranteed analysis, the ingredients and the feeding statement. It is part of the Feed & Seed features. If you sell feed and the editor has no Feed tag section, write to **support@dirtyroadsoftware.com**.

 WORDS TO KNOW**Guaranteed analysis**

The table of nutrients printed on a feed tag: crude protein, crude fat, crude fiber and so on, each with an amount.

As fed and dry matter

As fed means the percentages are measured on the feed as it comes in the bag. Dry matter means they are measured with the water taken out. Use whichever the tag says.

AAFCO statement

The sentence on a label saying the feed meets the nutrient levels set by AAFCO, the Association of American Feed Control Officials. It is often followed by feeding directions.

- 1 **Type the nutrient** as the bag prints it, such as *Crude Protein*. Roadside suggests the usual names as you type, plus any you have used before.
- 2 **Choose Min, Max or About.** The website prints (*min*) or (*max*) after the amount. About prints nothing extra.
- 3 **Type the amount:** the number alone, with no notes. *12.0* or *80,000,000* is right. *12.0 (as fed)* is not.
- 4 **Type the unit.** A percent prints tight, *12%*. Anything else prints with a space, *200 ppm*.
- 5 **Press + Add a row** for the next nutrient. A row with nothing in it is ignored, so a stray empty row does no harm.

Feed tag
The guaranteed analysis and ingredients as the bag prints them. The product's page shows the first three as the headline numbers, with the full table under them.

Nutrient	1	Min	2	Amount	3	Unit	5	4
Crude Protein	Min	27.00	%					
Crude Fat	Min	20.00	%					
Crude Fiber	Max	2.50	%					
Moisture	Max	12.00	%					
Omega 6 fatty acids*	Min	3.45	%					
Omega 3 fatty acids*	Min	0.26	%					

Type the nutrient as the bag prints it; the list suggests the usual ones. Leave a row empty to drop it. Up to 40 rows.

+ Add a row 6

- 1 The nutrient, typed the way the bag prints it. The list suggests the usual ones.
- 2 Min, Max, About, or none.
- 3 The number only, such as 27.00 or 80,000,000.
- 4 The unit: %, ppm, mg/kg, IU/lb and so on.
- 5 Move the row up or down, or remove it.
- 6 Adds another row. A tag holds up to 40.

The analysis rows for ShowTime 27/20.

Analysis basis 1

As fed

Calories 2

As printed, like 1,350 kcal/lb

Ingredients 3

Chicken Byproduct Meal, Pork Meat and Bone Meal, Ground Whole Wheat, Chicken Fat (preserved with Mixed Tocopherols), Corn Gluten Meal, Ground Yellow Corn, Wheat Middlings, Dried Beet Pulp, Poultry Digest, Ground Flaxseed, Malted Barley Flour, Menhaden Fish Meal, Brewer's Dried Yeast, Dicalcium Phosphate, Potassium Chloride, Salt, Calcium Propionate, Choline Chloride, L-Lysine Hydrochloride, Iron Sulfate, Zinc Protein, Vitamin E Supplement, Manganese Sulfate, Zinc Sulfate, Zinc Oxide, Copper Sulfate, Silica, Biotin, Manganese Oxide, Calcium Oxide, Calcium Hydroxide

One list, separated by commas, in the order the bag prints it.

- 1 As fed or Dry matter.
- 2 Calories, typed as the bag prints them, like 1,350 kcal/lb.
- 3 One list, separated by commas, in the order the bag prints it.

Under the rows: analysis basis, calories and ingredients.

Under the ingredients is **AAFCO or feeding statement (optional)**, a box with the same toolbar as the Description. Type the label's statement first. Then give the feeding directions as a short lead-in and a list with one line for each weight, such as *Toy (5 to 15 lbs): 1/2 to 1 1/4 cups per day.*

Press **Save product** to keep the tag. Roadside saves only the parts you changed, so a tag that came from the maker's information stays exactly as it came until you edit it. If a row is wrong, the red note says which one: *Row 3 of the guaranteed analysis needs both a nutrient and an amount.* or *Row 3 of the guaranteed analysis (Crude Fat) has more than an amount in it. Type just the amount and unit, like 80,000,000 CFU/lb, and leave notes off the row.*

How the website shows the headline numbers

Customers see the tag twice on the product page: a card beside the price with the three numbers people compare, and the full table lower down under Product details. The card links to the table with *See the full analysis*. When the size text has a weight in pounds, a *How long will a bag last?* calculator sits under it.

- 1 The headline numbers: Crude Protein, Crude Fat and Crude Fiber.
- 2 Jumps to the full analysis table.
- 3 Shoppers enter how many animals and how many pounds a day.

The tag card and the calculator on the website's page for ShowTime 27/20.

CAREFUL

The card on the website always shows Crude Protein, Crude Fat and Crude Fiber, in that order. It finds them by name, so type those three names exactly, with % as the unit. The preview beside the form, *As the website shows it*, lists the first three rows instead. When your first three rows are other nutrients, the preview and the website will not agree.

Fetch with AI

WHERE TO FIND IT **Inventory** >  **Products** > **New product**

Store owner, Manager

This appears when your plan includes it. The **Fetch with AI** button sits at the top of New product and of every product's editor. You give it the address of a product's web page, usually the maker's page. It drafts the name, brand, category, summary and description, the feed tag, the barcode and part number where it can find them, and up to three photos. Nothing is saved until you press **Add product** or **Save product**.

- 1 **Press Fetch with AI.** A box opens and asks for the product's page.

- 2 **Paste the address** from your browser's address bar, starting with `https://`.
- 3 **Press Fetch.** A bar shows how far along it is. Long pages take up to about two and a half minutes. The box stays open while it works, and Esc does not close it.
- 4 **Read the note** that appears under the heading, then check every field. The sections still to do are marked *For you*.
- 5 **Press Add product or Save product.**

Fetch with AI

Paste the address of the product's page, such as the maker's page for it. AI reads the page and fills in Name, Brand, Category, Summary, Description, the Feed tag and up to three photos. Check them before you choose Add product.

Product page

This replaces anything already typed in those fields.

Writing the name, description and feed tag... 24 s

Fetch **Cancel**

- 1 The address of the product's page.
- 2 How far along it is, and what it is doing now.
- 3 Fetch is off while it works.

The Fetch with AI box while it is working.

CAREFUL

Fetch with AI replaces whatever is already typed in Name, Brand, Category, Summary, Description and the Feed tag. Run it on a blank form, or on a product whose text you are happy to replace.

← Products

Purina Layena Pellets

Fetch with AI Cancel

Filled in from www.purinamills.com. Check it over before you choose Add product. Purina will be added to your brands when you save. 2 photos are in Photos, checked to add. Left for you, highlighted: Size and price, Website and Stock.

Basics

Description

Feed tag

Size and price For you

Photos

Website For you

Stock For you

Everything saves together with Add product. More sizes and photos can be added once it's saved.

Basics

The name, and where it sits in the store.

Name *

Purina Layena Pellets

Brand

Purina (new brand)

Category

Poultry

Add or rename brands

Summary

A complete layer feed in pellet form with 16% protein and calcium for strong eggshells.

One or two sentences, shown on the product's card and at the top of its page.

Description

About this product on the website: what it is, who it's for, how to use it. Paragraphs, headings, lists, bold and italic. Pasted text comes in plain.

- 1 What it filled in, what is new, and what is left for you.
- 2 Sections with a mark or For you still need a look.
- 3 A brand you do not have yet is added when you save.

A new product just after a fetch.

What to check

- **Name and brand.** A brand you do not have yet shows as *Purina (new brand)* and is added to your brands when you save.
- **Category.** It may come back empty. Choose one.
- **Summary and description.** The AI writes them from one web page, so read every sentence. Make sure they describe the bag you sell.
- **The feed tag.** Compare the numbers and the ingredients with the bag in your hand.
- **Photos.** They appear under *Photos from the product's page* with a tick. Uncheck the ones you do not want. A product keeps five photos, so only as many as fit start ticked.
- **Barcodes and part numbers.** A new product's first size gets them when it has none. On a saved product they are matched to sizes by amount and unit, and anything that matched no size is named in the note.
- **Size, price, Website and Stock.** Fetch with AI leaves these to you.

ROADSIDE SAYS

That doesn't look like a web page address.

WHAT TO DO

Copy the address from the browser's address bar. It starts with https://.

ROADSIDE SAYS	WHAT TO DO
That's a lot of products in one hour.	Each person can fetch 30 products an hour. Wait a few minutes. Photos have their own limit of 60 an hour.
Fetch with AI couldn't reach Dirt Road's console, or didn't work this time.	Try again in a minute.
A message about your monthly allowance, or about the license key.	Write to support@dirtyroadsoftware.com with the words on the screen.

Words that stop the website from updating

Before every update, Roadside reads the text customers can see: product names, summaries, descriptions, photo alt text, search titles and descriptions, and the rest of the writing on your website, such as reviews, answers and notices. It holds the whole update back when it finds a note that looks like one left for staff:

- A source note in brackets, such as (source: purinamills.com), (via ...), (according to ...), (from the label ...) or (per the manufacturer ...).
- Any brackets that contain a web address, such as (www.purina.com) or (https://...).

An ingredient like *Calcium carbonate (source of calcium)* is fine. While an update is held back, the website keeps its old pages. The **Publishing** tile on Website home says *The last publish stopped* and quotes the page and the words it found. Take those words out, press Save, and the next update goes through. Chapter 8, How your changes reach the website (page 49) explains the tile.

🔔 GOOD TO KNOW

Text pasted from a web page, and text written by Fetch with AI, can carry a source note. Look for brackets in the summary and description before you save.

13 Stock

Roadside keeps a count for each size you choose to count. This chapter covers turning counting on, recording a delivery, a shelf count or a correction, reading the history, what an online order does to the count, and where low stock shows.

IN THIS CHAPTER

- What Roadside counts, and what Low and Out mean
- Turning counting on, and the reorder point
- Recording a delivery, a shelf count or a correction
- The stock history
- What an online order does to stock
- Where low stock shows
- Suppliers on the product page

What Roadside counts

Counting is a choice you make for each size. A 50 lb bag you stock every week is worth counting. A custom order, a delivery fee or a service is not. A size you count has a number on hand, and Roadside changes that number when you record a delivery or a count and when a customer's online order goes through. Roadside learns nothing from a sale at the counter by itself, so a shelf count is how those sales get caught up.

WORDS TO KNOW

Counting (tracking)

Roadside keeps a number for the size. The screens call this *Track stock*. A size you do not count always shows as in stock on the website.

On hand

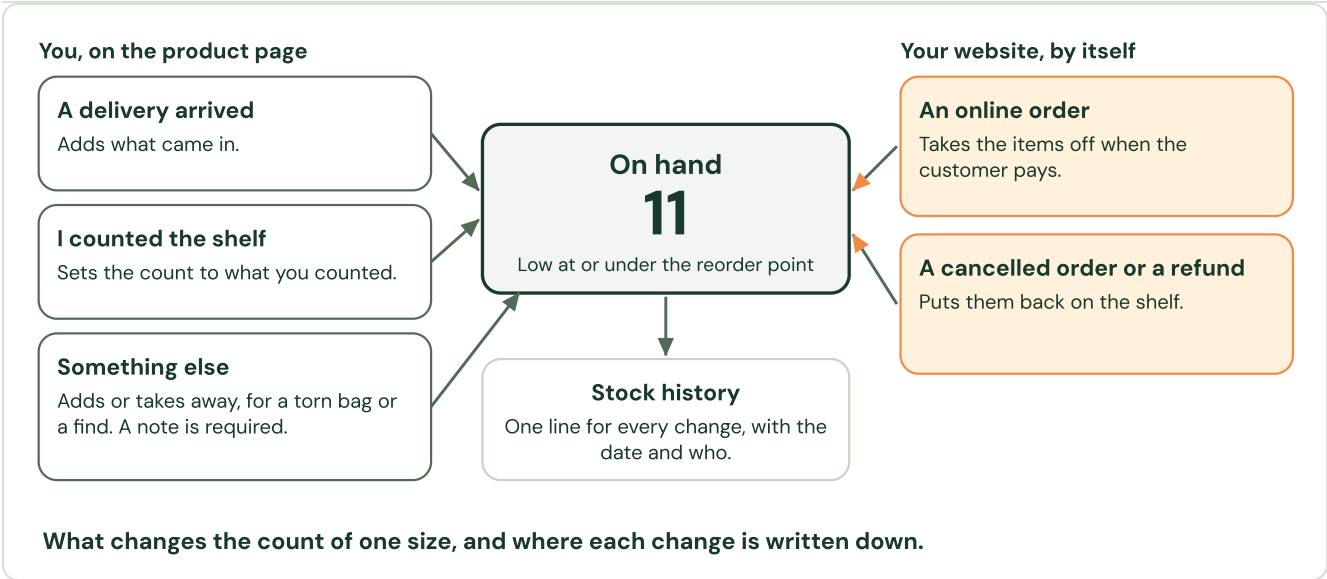
How many Roadside believes are in the store right now.

Reorder point

The number at or under which you want to be reminded to reorder. You choose it for each size.

Low and Out

A size is *Low* when its count is at or under its reorder point, and *Out* when it is at zero or below.



Turn counting on or off, and set the reorder point

WHERE TO FIND IT **Inventory** ›  **Products** › **Edit** › **Stock**

Store owner, Manager

On a saved product, the **Stock** section lists each size with a **Track** tick, its count and a **Reorder point** box. Tick the sizes you count, type a reorder point for each and press **Save product**. A **Low** badge appears beside a size that is at or under its reorder point.

Stock

Whether to count it, and when to call it low. The counts themselves change on the product's screen (a delivery came in, a shelf count, a correction), so the stock history stays whole.

Size	Track	On hand	Reorder point
50 lb bag	☒	11	6
20 lb bag	☒	3	4 Low

Turn tracking off for services and special orders. A size shows as low at or below its reorder point. [Update stock](#) on the product's screen.

- 1

Counted or not.
- 2
- The count. You cannot type it here.

3

Low at or under this number.

4

The **Stock** section for ShowTime 27/20. The 20 lb bag is low.

The count itself is not a box on this screen. It changes on the product page, one step at a time, so the history stays complete. A new product is different: **On hand now** is a box on the form, and a starting number other than zero goes into the history as *Opening stock*.

CAREFUL

A size you count with nothing on hand shows *Out of stock right now* on the website, and customers cannot order it. If a product is new and you have not typed a count, Roadside treats it as zero. Untick counting for anything you want to keep selling without a count. Chapter 17, Store settings (page 118) explains the switch that lets customers order items that are out of stock.

Record a delivery, a shelf count or a correction

WHERE TO FIND IT **Inventory** ›  **Products** › **product page** › **Stock on hand** Store owner, Manager, Staff

This is the daily job, and it happens on the product's page, not in the editor. Staff can do it as well as Managers and Store owners. A Read only person sees the numbers without the form.



Stock on hand

50 lb bag

11

20 lb bag

3 Low

Which size

20 lb bag

What happened

A delivery arrived

Quantity

10

Note

Invoice 4502

Update stock

- 1 The count for each counted size.
- 2 The 20 lb bag is at or under its reorder point.
- 3 Which size. This appears when the product has several.
- 4 What happened: a delivery, a shelf count or something else.
- 5 How many. What it means depends on what happened.
- 6 Saves it at once.

The Stock on hand card for ShowTime 27/20, ready to record ten 20 lb bags.

WHAT HAPPENED	QUANTITY IS	WHAT ROADSIDE DOES
A delivery arrived	How many came in, such as 12.	Adds that many.
I counted the shelf	How many are on the shelf now, such as 13.	Sets the count to what you counted and records the difference.
Something else (damaged, used, found)	A change: -2 to take two away, +2 to add two. A note is required.	Adds or takes away that many.

- 1 Open the product's page and look at **Stock on hand**. If the product has several sizes, choose the size under **Which size**.
- 2 Choose **what happened**, then type the quantity. Add a note: the supplier and invoice number for a delivery, or the reason for a correction, such as *Torn bag*.
- 3 Press **Update stock**. Roadside says *Stock updated. 14 on hand.* and adds a line to the history.

If you leave something out, Roadside says what is missing: *Enter how many arrived.*, *Enter how many are on the shelf.*, *Enter how much to add (or take away with a minus sign).* or *Say why stock is being adjusted (for example "damaged bag")*. Roadside does not stop a correction from taking the count below zero, so check the number it reports back.

If a product or size does not count stock, there is no form. Roadside says *Stock isn't tracked for this product*. Turn counting on in the editor first.

The stock history

Under the product page's left column, **Stock history** lists the last 50 changes, newest first. It is the record to look at when a count looks wrong.

Stock history

1 When	2 What	3 Change	4 Balance	5 By
Oct 6, 4:13 PM	Adjusted · 50 lb bag Torn bag	-2	11	Dana W
Oct 4, 9:13 AM	Counted · 50 lb bag Shelf count	-5	13	Dana W
Oct 2, 11:13 AM	Online order · 50 lb bag	-2	18	—
Sep 30, 12:20 PM	Online order · 20 lb bag	-3	3	—
Sep 29, 2:13 PM	Received · 50 lb bag Panhandle Feed invoice 4471	+12	20	Dana W
Sep 24, 10:20 AM	Opening stock · 20 lb bag Opening count	+6	6	Dana W
Sep 24, 10:13 AM	Opening stock · 50 lb bag Opening count	+8	8	Dana W

- 1 The date and time, in your store's time.
- 2 The reason, the size and your note.
- 3 What the count changed by.
- 4 What was on hand afterwards.
- 5 Who did it. A dash means Roadside did it by itself.

The history for ShowTime 27/20, both sizes together.

The reasons you will see are Received, Counted, Adjusted, Online order, Order cancelled, Refund back on the shelf, Returned and Opening stock. A line cannot be edited or deleted, which is what makes the history worth trusting. To fix a mistake, record a correction with *Something else* and say why in the note, or take a shelf count.

What an online order does to stock

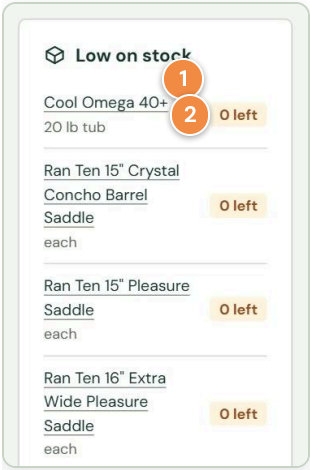
You do nothing for online orders. While a customer is paying by card, Roadside sets their items aside for a few minutes so nobody else can take the last bag. If the customer does not pay, the items go back. When the customer pays, the count drops and the history shows *Online order*. A cancelled order puts the items back (*Order cancelled*), and a refund can put them back too (*Refund, back on the shelf*).

The website counts a size as in stock when more are on hand than are set aside. So a size can look out of stock for a few minutes while someone's checkout holds the last ones. Chapter 18, Working the orders (page 128) covers the orders themselves.

Where low stock shows

Low stock shows in five places, and Roadside does not send an email or a text when something runs low. Looking at these is how you find out.

WHERE	WHAT IT SHOWS
Products list	A badge on the On hand number, and the <i>Low on stock</i> and <i>Out of stock</i> filters. See Chapter 9, Finding your way around products (page 58).
The Stock chart	Fine, Low and Out for every counted size, with a link to the list of what is low.
The product page and the editor	An orange <i>Low</i> badge beside the size.
Website home, Products card	The line under the product count: <i>8 low on stock</i> , or <i>Stock levels look fine</i> .
Website home, Low on stock tile	Up to six sizes at or under their reorder points, with how many are left. It appears only when something is low.



- 1 Press a name to open the product.
- 2 How many are left.
- 3 Opens the Products list, filtered to what is low or out.

The Low on stock tile on Website home.

CAREFUL

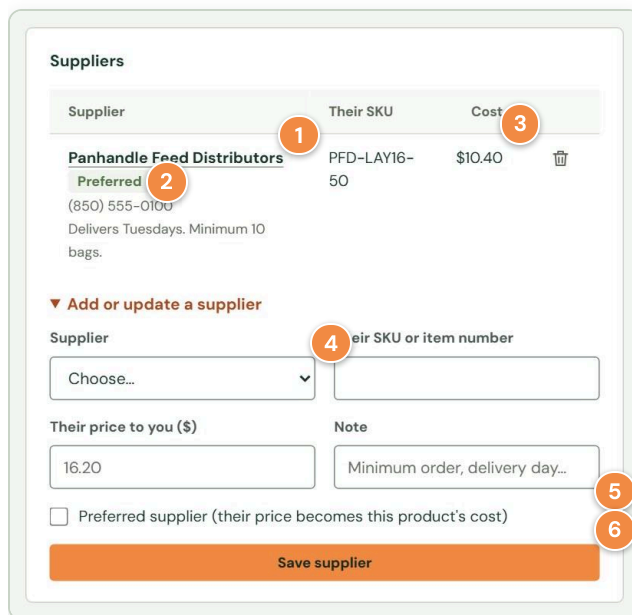
The Stock chart, the Products card and the tile count every size. The Low on stock and Out of stock filters on the Products list look at each product's first size only, so a product whose second size is low may count in the **3** and not appear in the filtered list. Open the product to see all its sizes.

Suppliers on the product page

WHERE TO FIND IT **Inventory** ›  **Products** › **product page** › **Suppliers**

Store owner, Manager

The **Suppliers** card records who you buy a product from, their item number and their price to you. A supplier is a customer-list account with the type *Vendor*, so add the supplier under **Customers, Accounts** first. Chapter 20, Customer accounts and contacts (page 146) covers accounts. Everyone who can open Products can read the card. The Store owner and Managers can change it.



The screenshot shows the 'Suppliers' card interface. At the top, there's a table with columns: Supplier, Their SKU, and Cost. A row for 'Panhandle Feed Distributors' is shown, with a 'Preferred' status and a price of \$10.40. Below the table, there's a section titled 'Add or update a supplier'. It contains a 'Supplier' dropdown menu, a 'Their SKU or item number' text input, a 'Their price to you (\$)' text input, and a 'Note' text area. There's also a checkbox for 'Preferred supplier (their price becomes this product's cost)' and a 'Save supplier' button at the bottom. Numbered callouts 1 through 6 point to specific elements: 1 points to the supplier name, 2 to the 'Preferred' status, 3 to the cost, 4 to the SKU input, 5 to the 'Preferred supplier' checkbox, and 6 to the 'Save supplier' button.

- 1 The supplier's account, with their phone and your note.
- 2 The preferred supplier's price is the product's cost.
- 3 Removes the supplier from this product.
- 4 Choose a vendor account.
- 5 Tick it to make their price this product's cost.
- 6 Saves the supplier.

The **Suppliers card for 16% Layer Pellets**, with the form open.

- 1 **Open Add or update a supplier.** Choose the supplier. If the list is empty, Roadside says *Suppliers are accounts with the type "Vendor". Add a supplier's account first.*
- 2 **Type their item number and their price to you.** A note can say the minimum order or delivery day.
- 3 **Tick Preferred supplier** if this is who you buy from. Their price becomes the product's cost, and Price history records a change from *Supplier cost*.
- 4 **Press Save supplier.** Roadside says *Supplier saved*. Choosing the same supplier again updates it.

The card belongs to the product's first size. The supplier's own account page has a **Products they supply** list in return.

14 Importing and exporting products

A spreadsheet is the quick way to add a long list of products or to change many prices at once. This chapter covers the file Roadside writes, the file it reads back, and the few things an update does that you might not expect.

IN THIS CHAPTER

- Exporting your products
- Importing a spreadsheet, step by step
- The columns Roadside understands
- How to write a size
- Updating products you already have
- Reading the result

Export your products

WHERE TO FIND IT **Inventory** ›  **Products**

Store owner, Manager, Staff

Press **Export CSV** at the top of the Products list. Your browser downloads a file named like `products-2026-10-08.csv`. A CSV file is a plain spreadsheet that Excel, Google Sheets and Numbers all open. It holds every product that is not archived, A to Z, with these columns: SKU, Name, Brand, Category, Size, Price, Cost, On hand, Reorder point, Taxable, Sell online, Barcode and Description.

Two things about the file are worth knowing before you open it. It lists **only the first size** of each product, so a product with a 50 lb bag and a 20 lb bag appears once, as the 50 lb bag. And it includes your **Cost** column. Staff and Read only people can export too, so treat the file the way you treat your price book. Importing is for the Store owner and Managers. **Description** in the file is the product's short summary, not the full description.

Import a spreadsheet

WHERE TO FIND IT **Inventory** ›  **Products** › **Import**

Store owner, Manager

The easiest way to start is to export, change the file, and import it back. Roadside reads the same columns it writes.

SKU	NAME	BRAND	CATEGORY	SIZE	PRICE	COST	ON HAND
4757	16% Layer Pellets	Mid-South Feeds	Poultry	50 lb bag	14.50	10.40	14
4	15% Layer Crumbles	Mid-South Feeds	Poultry	50 lb bag	16.95	12.15	6
9	Southern Supreme Mare & Foal 16/7	Mid-South Feeds	Horse	50 lb bag	21.83	17.45	22

- 1 Choose a CSV file, up to 2 MB.
- 2 Or paste the rows, header row first.
- 3 Tick it only to change products you already have. Read the section below first.
- 4 Runs the import.
- 5 The columns Roadside reads.

The Import products screen.

- 1 **Make the first row the column names.** Only **Name** and **Price** are required. The rest are optional, in any order. Extra columns are ignored.
- 2 **Write sizes in words** such as *50 lb bag*. The next section says how.
- 3 **Save the file as CSV.** In Excel, choose *CSV UTF-8 (Comma delimited)*. In Google Sheets, choose File, Download, Comma-separated values.
- 4 **Open Inventory, Products, Import** and choose the file, or paste the rows into the box.
- 5 **Leave the update box unticked** unless you mean to change products you already have.

- 6 **Press Import.** Read the banner at the top of the screen.
- 7 **Check a few products.** An import does not bring photos, a full description or more than one size. Add those in the editor.

The columns Roadside understands

Column names are not case sensitive. If your spreadsheet already has a different name for one, Roadside knows several.

COLUMN	ALSO UNDERSTOOD AS	WHAT IT HOLDS
SKU	Item number, Item #	Your item number. It is how an update finds the product.
Name	Product, Product name, Item	Required.
Brand	Manufacturer, Make	A brand you do not have yet is created.
Category	Department	A category you do not have yet is created.
Size	Size / unit, Unit, Unit label, Pack size	See below.
Price	Retail, Retail price	Required. Like 22.50.
Cost		What you pay.
On hand	Quantity, Qty, Stock	On a new product, the opening count. On an update, a shelf count.
Reorder point	Min	When the size shows as low.
Taxable		Yes or no. Yes, y, true, 1 and x all mean yes.
Sell online	Online	Yes or no. No sets the product to Hidden.
Barcode	UPC	The digits under the bars.
Description		The product's short summary, not the long description.

A spreadsheet sometimes puts a leading apostrophe in front of a cell. Roadside removes it.

How to write a size

Roadside needs the size as an amount, a unit and what it is sold as: *50 lb bag*, *1 gal jug*, *2.5 cu ft bag*, *100 ct box*, or just *each*. It understands the usual spellings, so *lbs* and *pound* work for lb. A size it cannot read skips the whole row, and the banner shows which row and what it saw: *Size "5 pounds of grain" wasn't understood. Write it like "50 lb bag", "1 gal jug", "100 ct box" or "each".*

Update products you already have

With **Update products that already exist (matched by SKU)** ticked, a row whose SKU matches a product changes that product. This is how you change many prices at once. With the box unticked, a row with a SKU you already use is skipped and the banner says so: *SKU 4757 already exists (tick "Update products that already exist" to change it).*

CAREFUL

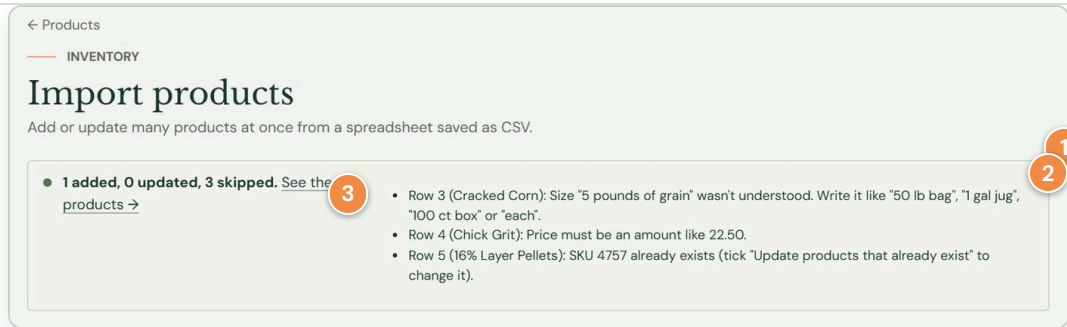
An update is more than a price change. For every product in the file it does all of this:

- It overwrites each column in your file, for every row, and an **empty cell empties that field**. An empty Cost cell sets the cost to nothing, and an empty Brand, Category, Barcode or Description cell clears it. To leave a field alone, leave that column out of the file.
- It changes only the product's **first size**. Other sizes, photos and the full description are not touched.
- It puts the sales tax class back to plain *Taxable* or *Not taxed*, which loses a class such as Livestock and poultry feed. Choose the classes again in the editor.
- It treats the On hand column as a shelf count and overwrites the count, so an out-of-date number in the spreadsheet replaces a good one.
- It sets a Draft product to *For sale*.

Rows with no SKU are always new products. Import the same SKU-less file twice and you have every product twice. New products start as *For sale*, counted, with the On hand number as the opening count. Sell online left empty means yes.

Read the result

When the import finishes, a banner at the top says how many products were added, how many were updated and how many rows were skipped, and lists the skipped rows, up to 50. The row number is the spreadsheet's row, counting the header as row 1. Each row is saved on its own, so one bad row does not stop the others. Fix the skipped rows and import only those.



- 1 Added, updated and skipped. 3 Opens the Products list.
- 2 Each skipped row, with the reason.

The banner after an import with one good row and three that need fixing.

A few messages stop the whole file before any row is read: *Choose a CSV file or paste the rows.*, *The file needs a header row and at least one product.*, *The header row needs at least "Name" and "Price" columns.*, *Import up to 5,000 products at a time.* and *That file is too large. The limit is 2 MB.* Rows that fail show the reason after the product's name: *Give the product a name.*, *Price must be an amount like 22.50.*, *Another product already uses the barcode* and the size message above.

15 Compliance watch and Pricing check

Compliance watch lists the farm documents your customers have given you and tells you which are about to run out. Pricing check, when your plan includes it, shows where your prices sit against other stores. Both show you information. Neither changes a tax or a price by itself.

IN THIS CHAPTER

- Compliance watch: the three lists and the 45-day warning
- Recording a customer's farm documents
- What Compliance watch does not do
- Pricing check: what it compares and the four tabs
- How prices are compared: your settings
- Look up now, and Same or Different

Compliance watch

WHERE TO FIND IT **Feed & Seed** ›  **Compliance watch**

Store owner, Manager

Compliance watch is part of the Feed & Seed features. Farm customers hand you paperwork that has an end date, and a feed store needs to know when it lapses. This screen collects that paperwork from your customer accounts into one list. If your menu has no Feed & Seed group, write to **support@dirtroadsoftware.com**. Staff do not see it unless their role can open Accounts.

WORDS TO KNOW

Ag tax exemption

A farm's exemption certificate: its number and the date it expires.

Veterinary Feed Directive (VFD)

A vet's written order that a farm needs before it can buy medicated feed. Roadside records the vet's name and the date the directive ends.

Restricted-use pesticide license

The applicator license a buyer needs for restricted-use pesticides: its number and expiry date.

FEED & SEED

Compliance watch

Ag tax exemptions, Veterinary Feed Directives and restricted-use pesticide licenses on file.

Expired 2

Account	Document	Reference	Status	Phone
Dunn Dairy A-1013	Ag tax exemption	FL-AG-177302	Expired Sep 18, 2026	(850) 555-0182
Marlow Hay & Forage A-1012	Restricted-use pesticide license	FL-PA-55120	Expired Oct 2, 2026	(850) 555-0156

Expiring within 45 days 4

Account	Document	Reference	Status	Phone
Holloway Cattle Co. A-1009	Veterinary Feed Directive	Dr. L. Mercer, Tri-County Vet	Expires in 12 days	(850) 555-0171

- 1 Documents past their end date.

2 Documents that end within 45 days.

3 The customer. Press the name to open the account.

4 The document's number, or the vet's name.

5 When it expired or how many days are left.

Compliance watch. The page continues with a **Current** list below.

The screen has up to three lists, each with a count. **Expired** comes first, then **Expiring within 45 days**, then **Current**. A list with nothing in it is left out. Within each list the soonest end date comes first. The Status column reads *Expired Oct 3, 2026*, *Expires in 12 days* or *Valid to Dec 1, 2026*. A document with a number and no date reads *On file* and never expires. Website home shows the soonest six in its own **Compliance watch** tile.

Record a customer's farm documents

WHERE TO FIND IT

Customers

Accounts

account

Edit

Store owner, Manager

A customer appears on Compliance watch because of three pairs of boxes on their account. Open the account, press **Edit**, find **Compliance documents**, fill in what the customer gave you and press **Save changes**. Chapter 20, Customer accounts and contacts (page 146) covers accounts.

Compliance documents

Ag exemption number

FL-AG-208814

State ag/timber or farm exemption certificate number.

Exemption state

FL

Exemption expires

11/01/2026

Vet veterinarian

Dr. L. Mercer, Tri-County Vet

Veterinary Feed Directive on file for medicated feed.

VFD expires

10/20/2026

Restricted-use license #

Applicator license for restricted-use pesticides.

License expires

mm/dd/yyyy

- 1

The farm's exemption certificate number.
- 2

The date the certificate expires.
- 3

The vet who wrote the Veterinary Feed Directive.
- 4

The date the directive ends.
- 5

The applicator license number.
- 6

The date the license expires.

The Compliance documents card on the edit screen for Holloway Cattle Co.

- A document counts as on file only when its first box has something in it: the certificate number, the vet's name or the license number.
- A date with nothing in the first box is ignored.
- A number with no date shows as *On file* and never expires.

The account's own page shows the three documents in a **Compliance** card, each marked *Not on file*, *Valid to a date*, *Expires in N days* or *Expired*. When a customer brings a renewed certificate, open Edit, type the new date and save. The customer moves back to Current.

Compliance

Ag tax exemption

Expires in 24 days

Veterinary Feed Directive

Expires in 12 days

Restricted-use pesticide license

Not on file

- 1

One line for each document.

The Compliance card on a customer's account page.

CAREFUL

Compliance watch keeps a record and shows a warning. It does not change the tax on an order, hold back a sale or send you a reminder, even for a document that has expired. Checkout works out tax from the item's sales tax class (Sales tax class, in Chapter 11 (page 79)) and from the customer's own *Tax exempt* setting on their account. If a customer's certificate lapses, change that setting yourself.

Pricing check

WHERE TO FIND IT **Inventory** > **Pricing check**

Store owner, Manager, Staff

This appears when your plan includes Price Watch. Pricing check compares your prices with what other stores charge for the same items, so you can see where you are high and where you have room to go up. Staff can read the screen. Changing the settings, pressing Look up now and answering Same or Different belong to the Store owner and Managers.

Roadside finds other stores' prices by an item's barcode, its part number, or its name and size, which is why those boxes on a size are worth filling in (Chapter 11, Sizes, prices and photos (page 74)). To do that, Roadside sends Dirt Road the product's name, brand, size, part number and barcode, and the town you set. It never sends your price or your cost. The comparing is done inside Roadside.

Pricing check

Your prices against the market median, from other stores selling the same products. Anything more than 10% over or under is listed. These are suggestions; nothing changes a price by itself.

Look up now

4 of 25 products watched · 40 sizes waiting to be looked up · prices are kept 7 days.

Over market (2)Room to go up (1)In line (1)No market yet (1)

Product	Your price	Compared with	Difference	Margin now / at that price	Suggestion
ShowTime 27/20 50 lb bag	\$38.00	\$33.50 6 stores, Oct 7	\$4.50 over (13%)	18% / 7%	— Your margin floor keeps it at this price.
16% Layer Pellets	\$14.50	\$12.99 5 stores, Oct 7	\$1.51 over (12%)	28% / 20%	\$13.00 The lowest your margin floor allows.

- 1

Asks for fresh prices.
- 2

How many products your plan covers, and how long a price is kept.
- 3

Four tabs, each with a count.
- 4

How far your price is from the price you compare with.
- 5

A suggested price, never below your margin floor.

Pricing check, on the Over market tab.

TAB	WHAT IS ON IT
Over market	Your price is above the comparison price by more than your limit. The furthest over comes first.
Room to go up	Your price is below it by more than your limit. The furthest under comes first.
In line	Within your limit either way.
No market yet	No store lists the item online, or the lookup came back empty.

Each row names the product and its size. Press the name to open its Price Watch section in the editor. The row then gives your price, the price it is compared with and how many stores it came from, the difference, your margin now and at that price, and a suggestion. A suggestion never goes below cost plus your margin floor. When the market is under that, the note says *Your margin floor keeps it at this price.* or *The lowest your margin floor allows.* A size that has never been looked up is on no tab yet.

 GOOD TO KNOW

Pricing check suggests. You decide. If you agree with a suggestion, change the price yourself as described in Change a price, and run a sale, in Chapter 10 (page 72).

How prices are compared

How prices are compared

Compare with

- ☒ The market median
- ☐ The lowest price
- ☐ One competitor

Pick a store

List it when it's more than

10

percent

over or under the price you compare with.

Margin floor (percent)

20

Suggestions never go below cost plus this margin.

Your town, for nearby prices

Baker, Florida, United States

Like "Baker, Florida, United States". Left empty, the store's own address is used.

Save

- 1 The median of other stores, the lowest price, or one competitor.
- 2 How far over or under a price must be to be listed.
- 3 Suggestions never go below cost plus this percent.
- 4 Your town, for nearby prices.
- 5 Saves the settings.

The settings card on Pricing check.

The card on the right of the screen is called **How prices are compared**. The **median** is the middle price among the other stores', so one store with an odd price does not swing the answer. Pick *One competitor* and choose the store from the list of stores seen so far. **List it when it's more than** takes a number in percent or in dollars. It starts at 10 percent. **Margin floor** is a whole percent from 0 to 99 and starts at 20. If you leave **Your town** empty, Roadside uses your store's own address. Press **Save** and Roadside says *Saved*.

Look up now, and Same or Different

Prices come from a lookup that runs through the day. **Look up now** on the Pricing check screen asks for up to 25 sizes to be looked up in a minute or two, and the rest follow a few at a time. Prices are kept for the number of days the screen shows, so looking up again before then shows the same ones.

Open a product's editor and choose **Price Watch** in the side menu to see the stores behind a number.

Price Watch

What other stores charge for this product, found by its barcode, part number or name and size. The sums with your price and cost are done here and never leave Roadside.

50 lb bag

Over market

Your price

\$38.00 · margin 18%

Market

\$31.99 to \$34.99, median **\$33.50** · 6 stores

Delivered

median \$34.99 with shipping

Against the market median

\$4.50 over (13%) · margin at that price 7%

Suggestion

Your margin floor keeps it at this price.

Looked up

Oct 7, 2026

Store	Price	With shipping	Found by		
Gulf Coast Feed & Supply	\$32.99	\$32.99	Barcode	Same	Different
Panhandle Pet & Farm	\$33.49	\$36.98	Barcode	Same	Different
Riverbend Farm Store	\$33.75	not listed	Part number	Same	Different
Southern Hay & Grain	\$31.99	\$31.99	Barcode	Same	Different
Pine Hill Feed	\$34.99	\$34.99	Part number	Same	Different
Cypress Creek Feed ShowTime Performance	\$33.50	not listed	Name and size	Same product?	Same

- 1

Where this size stands.
- 2

Your price, the market, and what the comparison means for your margin.
- 3

Each store that was found, and how Roadside matched it.
- 4

Say the match is the same product.
- 5

Say it is a different product.

The Price Watch section for the 50 lb bag of ShowTime 27/20.

The **Found by** column says how Roadside matched each store: *Barcode* and *Part number* are close to certain, and *Name and size* is a guess. For a guess Roadside asks *Same product?*. Press **Same** or **Different**, and Roadside re-does that size's numbers. Your answer reads *Same product* or *Different product* afterwards, with a **Forget** link to take it back. Offers that are not counted show in grey, and one marked *far off the median* is a price well away from the rest.

The section ends with its own **Look up now** for the product. Its results read *Prices looked up.*, *This product is past your Price Watch plan.* or *No store lists it online yet.* Pricing check never changes a price on its own.



PART 4

Selling online

How customers order, how you handle the order, and how the money gets to you.

16 How online ordering works

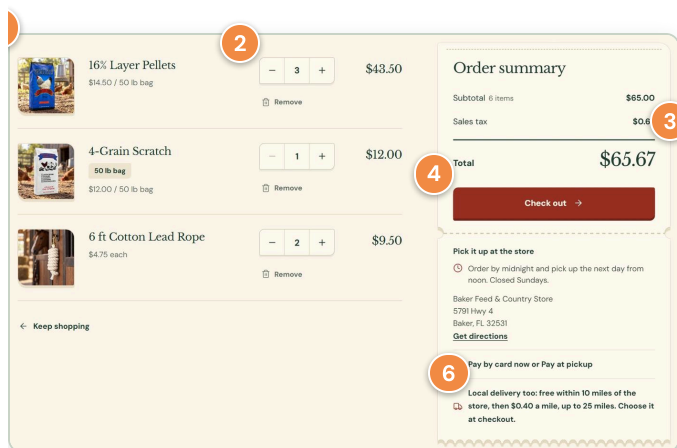
A customer builds an order on your website, picks a day, and pays by card or at the counter. Roadside sets the stock aside, sends the emails and puts the order in front of you. This chapter follows one order, first as the customer sees it and then as you handle it.

IN THIS CHAPTER

- The cart, the checkout and the order page a customer sees
- Pickup or delivery, and the ways a customer can pay
- The emails that go out
- Website accounts and farm tax exemption cards
- What happens to the stock and the money at each step
- Who can do what

The cart

A customer adds products to a cart on your website and presses **Check out**. The cart is kept in the customer's own browser, so you never see a cart that someone left behind, and a customer who starts on a phone and moves to a computer starts over. Every time the cart opens, Roadside checks each price, the sales tax and what is on the shelf. The numbers on the page come from your product records.



- 1 One line for each product, with its size, its price and a **Remove** link.
- 2 The customer changes the quantity here.
- 3 Sales tax, worked out from your location and each product's sales tax setting.
- 4 Takes the customer to the checkout.
- 5 Your pickup rule and address, from **Store settings** and **Store info**.
- 6 Appears when you offer delivery, with your delivery terms.

A cart on the sample store's website. The words on your own website may differ a little from this picture.

A line shows a problem in words the customer can act on, and **Check out** stays grayed out until the problem is gone. Most of these come from settings you control.

THE CUSTOMER SEES	WHY
Only 3 of 16% Layer Pellets left.	The product tracks stock and the quantity is higher than what is on the shelf. A product with stock at zero reads <i>is sold out</i> .
X can't be ordered online right now.	The product is set to special order, call to order, out of stock or out of season. For the first two the line adds <i>Call the store to order it</i> .
You can order up to 100 of X online. Call the store for more.	The quantity is above the most of one product per order. Your store-wide limit is 100 unless you change it, and a product can set a lower one.
Orders start at \$25.00. Add \$10.00 more to check out.	You set a minimum order. There is none until you do.

The checkout

The checkout is one page with three steps. A customer who pays by card never leaves your website: the card number goes straight into the card processor's own secure fields on the page, and Roadside never sees or keeps it. Step 1 asks for the customer's details. Name and email are always asked for, and the receipt and the ready note go to that email. Phone is required unless you set it to optional, and a delivery order always needs one. A farm or business name is asked only if you turn it on. A customer with a website account can sign in at the top of the step and the form fills itself. Guests can always check out.

Step 2 is the day. A customer chooses pickup at the store or, when you offer it, local delivery. The page shows your pickup rule and up to six days to choose from, with a **Show more days** link for the rest. Days you are closed, days that are full and days past your limit never appear. The customer can also leave a note with the order.

2 Pickup or delivery

☒ **Pick up at the store**
Free. Ready at the store.

☐ **Local delivery**
Free within 10 miles of the store, then \$0.40 a mile, up to 25 miles.

Order by midnight and pick up the next day from noon. Closed Sundays.

Tomorrow Friday Oct 9

Saturday Oct 10

Monday Oct 12

Tuesday Oct 13

Wednesday Oct 14

Thursday Oct 15

[Show more days](#)

Anything we should know? Optional

- 1 Pickup is always offered. Local delivery appears when you turn it on.
- 2 Your pickup rule, in your words: cutoff time, ready time and closed days.
- 3 The first available day is chosen already.
- 4 The customer's note. It shows on the order and on the pick ticket.

Step 2, pickup or delivery and the day.

When the customer chooses delivery, the page asks for a street address, town and ZIP code and works out the distance from your store. The fee shows as soon as the address is complete. The delivery fee is not taxed. Delivery, in Chapter 17 (page 123) explains how you set the distances and the charge.

2 Pickup or delivery

☐ **Pick up at the store**
Free. Ready at the store.

☒ **Local delivery**
Free within 10 miles of the store, then \$0.40 a mile, up to 25 miles.

Where should we bring it?

Street address

4410 Old Bethel Rd

Apartment, unit or lot Optional

Town

Baker

ZIP code

32531

About 14.2 miles from the store: \$2.00 delivery.

Address lookup © OpenStreetMap contributors

- 1 The terms you set, in plain words.
- 2 Street address, town and ZIP code. A phone number is required for delivery.
- 3 The distance from the store and the delivery fee, with a credit line for the address lookup.

Choosing local delivery. The distance and the fee appear under the address.

Step 3 is payment. The customer sees only the ways you have turned on. Paying by card opens a short **Pay** panel for the card. **Pay at pickup** places the order on the spot, and the customer pays you at the counter, or the driver on delivery, and you record how. Chapter 19, Payments, holds and refunds (page 138) covers card payments, holds and bank payments in detail.

3 Payment

☒ **Pay by card**
We hold the amount on your card and charge it when we confirm your order, only for what's on the shelf.

☐ **Pay at pickup**
Pay at the counter when you pick it up.

Continue to payment →

On the next step your card is held, not charged. We charge it when we confirm your order.

- 1 The ways to pay that you have turned on.
- 2 The button changes with the choice: **Continue to payment** for a card, **Place order** for pay at pickup.
- 3 A line under the button says what happens next, so the customer knows whether the card is held or charged.

Step 3, payment.

WORDS TO KNOW

Card processor

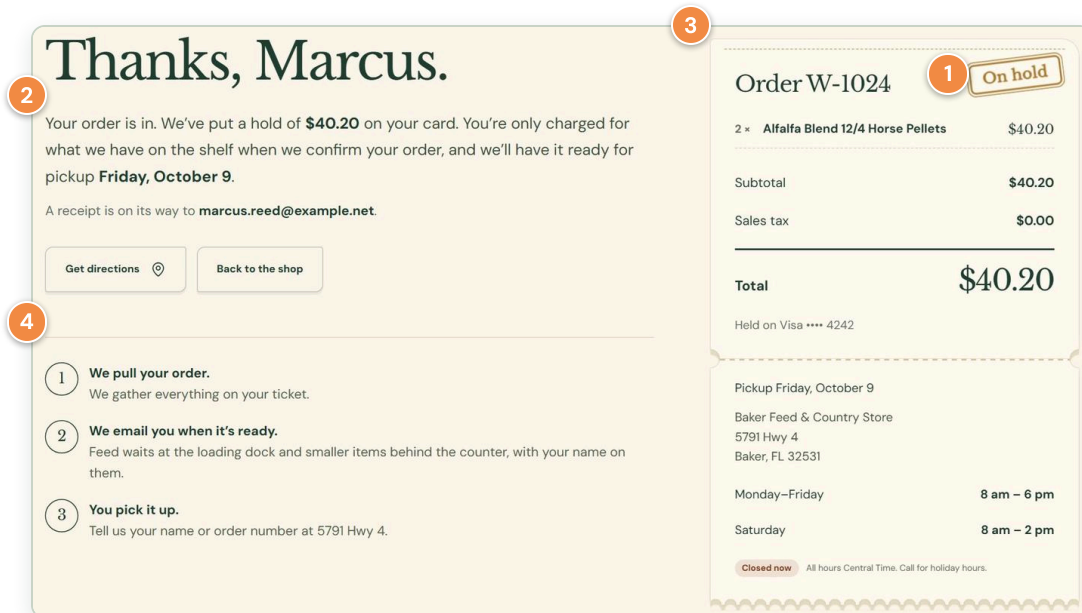
The company that handles card payments for your store. Stripe and Clover are two. You have your own account with it, with its own fees and its own dashboard. Dirt Road connects it to Roadside. To add or change one, write to **support@dirtyroadsoftware.com**.

Hold

Money set aside on a customer's card without taking it. The customer sees it as pending. You can charge the card later for what you have on the shelf, or let the hold go.

The order page and the emails

After the order is placed, the customer lands on an order page that shows the items, the total, the pickup or delivery day and what happens next. The stamp in the corner changes as you work the order: *On hold*, *Paid*, *Pay at pickup*, *Ready*, *Picked up* or *Cancelled*.



- 1 The stamp shows where the order stands.
- 2 A sentence about this order: the hold, the pickup day and where the receipt went.
- 3 The ticket: items, tax, total and how the customer is paying.
- 4 What happens next, in three steps.

The order page for a card that is on hold.

⚠ CAREFUL

The emails Roadside sends do not contain a link to the order page. A customer sees the page once, right after ordering, and later only by signing in to a website account. A customer who has no account and wants to check on an order calls you with the order number from the email.

Roadside emails the customer in plain text, within about a minute. Each email ends with the sign-off you write in **Store settings**, then the name of your store.

WHEN	SUBJECT	WHAT IT SAYS
The order is placed	We got your order W-1023	The items, the totals, the pickup or delivery day, your pickup instructions and one line about payment. A card order sends it once the card is held or paid.
You mark it ready, if Email customers when their order is ready is on	Your order W-1023 is ready for pickup	The ready time, what is still due, and a request to mention the order number.
You cancel it with Email the customer ticked	Your order W-1023 was cancelled	Your reason, in your words. It says the payment is being refunded when money had been charged.
A bank payment comes back	About your order W-1023	The bank did not send the money, the order is cancelled and nothing was taken.
A card hold ran out first	About your order W-1023	The hold was released and nothing was charged. The order is still on and the customer can pay at pickup.

Subject: We got your order W-1023

Hi Gene Whitaker,

Thanks for your order! We'll email you when it's ready.

- 4 x 16% Layer Pellets \$58.00
 - 2 x 4-Grain Scratch (50 lb bag) \$24.00

Subtotal: \$82.00

Total: \$82.00

Pickup: Friday, October 9, from noon.

Payment is taken when you pick up.

Baker Feed & Country Store

The confirmation for a pay-at-pickup order.

No email goes out when an order is marked picked up, when you refund, or when a customer sends in a farm tax exemption card. Your own staff get an email only if you fill in **Email new orders to** on the **Emails & policies** tab. It is blank until you do, and until then a new order shows up only on the screen.

Website accounts and farm tax exemption cards

A customer can make an account on your website. It is optional and guests can always check out. An account keeps a list of the customer's orders, fills in the checkout details, and has a place to send in a farm tax exemption card. Customers sign in on your website, not in Roadside, and Roadside has no screen for listing, resetting or turning off a customer's website sign-in. A customer who forgets the password uses the **Forgot your password?** link on the sign-in page.

Each web order also adds the customer to your **Accounts** list under **Customers**, tagged *online customer*, with a note for the order. Chapter 20, Customer accounts and contacts (page 146) covers what to do with them.

Farm tax exemption

If your farm has a Florida Agricultural Exemption (TEAM) card or a certificate, add it here. Once we've checked it, the items it covers aren't taxed when you check out. Until then, tax is charged as usual.

2

Farm tax exemption (TEAM) card 4417

Waiting for the store to check it Expires Oct 8, 2028

► Add a card or certificate

- 1** What the customer is told. Roadside shows only the last four digits back.
- 2** The card as sent, marked *Waiting for the store to check it*.

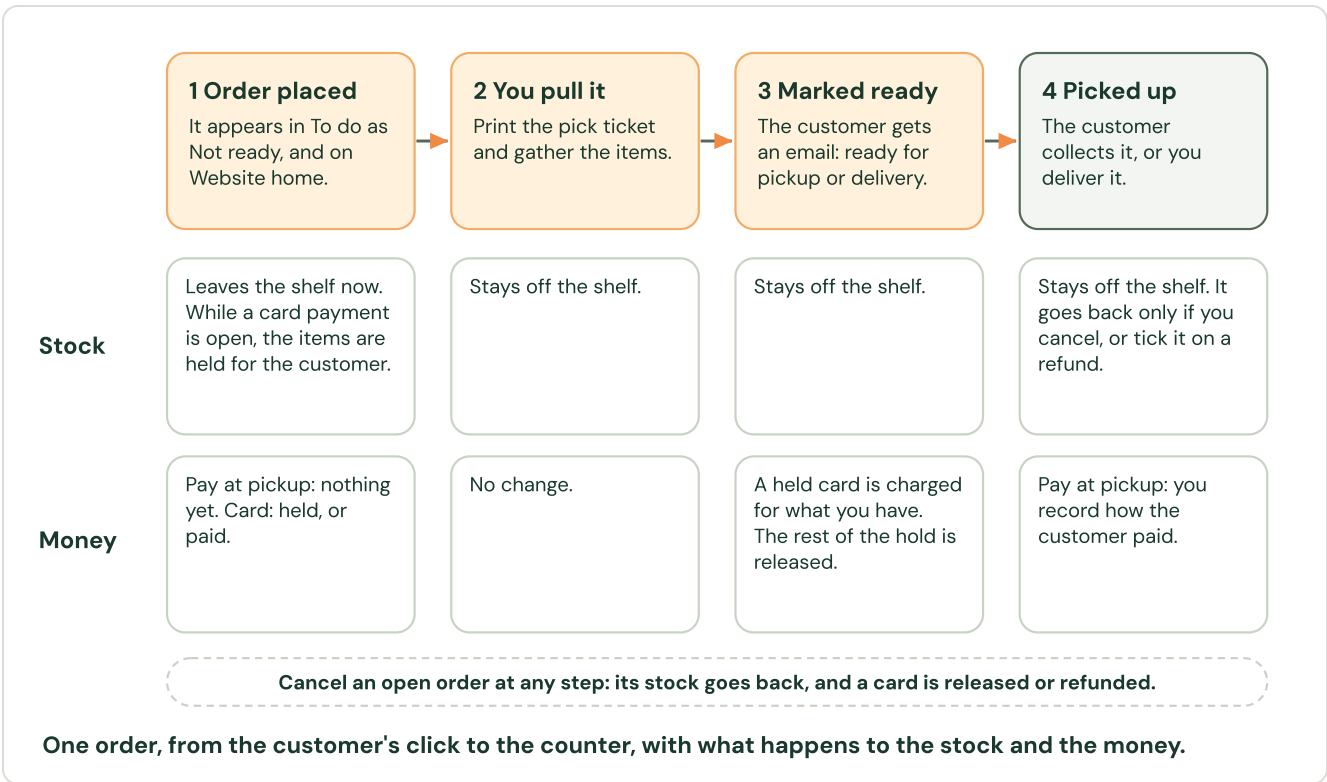
Where a customer sends in a farm tax exemption card.

CAREFUL

A card that a customer sends in stays marked *Waiting for the store to check it*, and the panel has no screen where you can check it. Until a card is checked, Roadside charges tax on the order as usual, and it does not email the customer either way. Items that your product settings mark as tax-exempt are never taxed. If a customer who holds a card needs tax taken off an order, deal with it at the counter, or refund the tax afterward with the reason *Tax exemption shown* (see Refunds, in Chapter 19 (page 143)).

What happens to an order

You see a new order in three places: on Website home under **Online orders to prepare**, in **Online orders** under the **To do** tab, and in an email if you filled in **Email new orders to**. From there it moves through the same four steps whether the customer paid by card or will pay at the counter.



Stock leaves the shelf when the order opens: at once for a pay-at-pickup order, and when the card is held or paid for a card order. It comes back if you cancel the order. This applies to products that track stock; Chapter 13, Stock (page 90) explains how to turn that on.



While a customer is paying

A card checkout takes a few minutes. While the customer pays, Roadside sets the items and the pickup day aside, so another customer cannot buy the last bag or take the last slot on a day you have limited. If the payment does not finish in about an hour, the order turns to *Not paid* and everything goes back. You can find these on the **Not paid** tab of **Online orders**. They keep their order numbers, so your numbers have gaps.

A bank payment works differently. It takes about four business days, the stock stays set aside, and the order does not appear in **To do** until the money arrives.

Who can do what

Store owners and Managers run the daily work of online ordering. Staff can work the orders but cannot refund or change settings. Chapter 26, Your team and what each role can do (page 211) lists every role.

JOB	STORE OWNER	MANAGER	STAFF
See orders, print a pick ticket, add a staff note	Yes	Yes	Yes
Mark an order ready, picked up, or record a counter payment	Yes	Yes	Yes
Cancel an order	Yes	Yes	Only if no money is on it
Refund, release a hold, settle a payment issue	Yes	Yes	No
Change Store settings	Yes	Yes	No

Sales tax comes from the tax rates Dirt Road sets up for your county, together with the sales tax setting on each product. There is no tax screen in Roadside. If tax looks wrong on an order, write to **support@dirtroadsoftware.com** with the order number.

17 Store settings

Store settings decide how customers order from your website: whether ordering is open, which days they can pick up, whether you deliver, how they pay and which emails go out. Each tab saves on its own.

IN THIS CHAPTER

- Opening and closing ordering, for a day or for a season
- The cart and the checkout form
- Pickup days, cutoff times and closed days
- Delivery by distance
- Choosing how customers pay
- Emails and your store policies

How the tabs work

WHERE TO FIND IT **Online store** ›  **Store settings**

Store owner, Manager

Store settings has six tabs: **General**, **Checkout**, **Pickup**, **Delivery**, **Payments** and **Emails & policies**. You reach it from the menu or from the **Store settings** button on **Online orders**. Staff do not see it.

Every tab is its own form with its own save button, such as **Save pickup settings**. The tabs are plain links, so leaving a tab without pressing its save button throws away what you typed. After a save you see a green line such as *Pickup settings saved*. A number outside the allowed range is not refused. Roadside quietly moves it to the nearest allowed number, so 200 miles for delivery becomes 100.

Most changes reach your website within a few minutes. Chapter 8, How your changes reach the website (page 49) explains how a change gets there.

General: open or close ordering

Ordering is off until you turn it on. While it is off, your website shows products and prices but has no working checkout, and every Store settings tab shows a notice that says so.

Turn ordering on after at least one way to pay is on (see the Payments tab below). Without one, the checkout tells the customer *This store isn't taking payments online yet. Please call the store to order*.

When you turn ordering off, orders already placed are not touched, and the customers who placed them still get what you promised. Customers who reach the checkout see your message. The website itself changes to its call-to-order wording and drops the cart, and that takes a few minutes to show. For a holiday, you usually want to close particular days instead of switching ordering off; the steps for both are in Close for a holiday, in Chapter 18 (page 137).

- 1 The master switch for online ordering. Off by default.
- 2 Browse and order is the default. Browse only shows prices with no cart, for customers who call or visit to buy.

- 3 What customers read at checkout while ordering is off. Up to 500 characters. Blank shows *This store is not taking online orders right now. Please call the store.*

The General tab.

Checkout: the cart and the form

The Checkout tab has three cards. The first controls the cart.

The hold switch only works with a card processor that can hold a card, and Stripe can. Roadside never charges a held card on its own. Holds, in Chapter 19 (page 139) explains what a hold does and how long it lasts.

Cart

1 Minimum order

No minimum

Before tax. Leave blank for no minimum.

2 Most of one product per order

100

Catches typos like 500 instead of 5. A product can set a lower limit of its own.

3 ☐ Take orders for items that are out of stock

Stock can go below zero. Products can also allow this one by one.

4 ☒ Hold the card at checkout, and charge it when you confirm the order

The customer is charged only for what you have when you mark the order ready. A hold lasts about 7 days; Roadside reminds you on day 5. Bank payments can't be held and are charged at checkout.

- 1

No minimum until you type one, as a dollar amount such as 25 or 25.00. It is counted before tax.
- 2

Catches a typing mistake such as 500 bags for 5. From 1 to 9999, and 100 by default.
- 3

When ticked, stock can go below zero. A product can also allow this on its own page.
- 4

Holds the customer's card at checkout and charges it when you confirm the order. Off by default.

The Cart card.

Checkout form

Name, email and pickup day are always asked for.

1 Phone number

Required

2 Business name

Optional

Used as the account name for new customers.

3 ☒ Ask for a note with the order

Note question

Anything we should know?

4 ☐ Customers tick a box to agree to the store's policies

Off: the checkout says that placing the order means they agree.

5 ☐ Offer a box to get news and specials by email

Never ticked in advance. The answer is saved on the order and the customer.

Email sign-up wording

Email me news and specials. I can unsubscribe at any time.

- 1

Required by default: at least 7 digits. A delivery order always asks for one.
- 2

Don't ask is the default. Optional or Required adds a Farm or business box.
- 3

A note box on the order, up to 1000 characters. The note shows on the pick ticket.
- 4

When ticked, an unchecked policies box blocks the order with *Please agree to the store's policies.*
- 5

Adds a box that is never ticked in advance.

The Checkout form card.

Name, email and pickup day are always asked for. The wording of the note question (up to 80 characters) and of the news box (up to 120) is yours to change. The news box does not add anyone to your email list. It puts the badge *Asked for news by email* on the order and tags a new customer *email sign-up* in your Accounts list. Chapter 21, The email list (page 156) covers the list itself.

This box and your policy text work together. On the sample store's website the text you write under **Returns, refunds and other policies** (on the Emails & policies tab) shows behind a *Read the policies* link. That link appears only while **Customers tick a box to agree to the store's policies** is on. With the box off, the checkout shows no policies at all.

1 Leave this empty.

2 Up to 6 capital letters or numbers, with an optional dash at the end. The default is W-.

The After the order card.

CAREFUL

Roadside saves what you type in **Thank-you message**, but customers never see it. The order page, the emails and the website do not show it. Leave it empty.

The order number prefix applies to new orders only. Numbers start at 1001, so the first order is W-1001. Every checkout gets its number when it starts, including a card checkout that is never paid, so you will see gaps in the numbers.

Pickup: days, times and closed days

The Pickup tab sets when an order can be picked up. Every day and time uses the time zone on your **Store info** screen, not the customer's.

The **Ready after** choices are *The same day*, *The next day*, *2 days*, *3 days*, *5 days* and *A week*. Under the card, a line that begins *Customers see:* shows your rule the way the website words it. If a pickup day fills while a customer is checking out, the customer is asked to choose another.

1

Order cutoff

11:59 PM

🕒

Orders after this time count as the next day. 23:59 means "order by midnight".

2

Ready after

The next day

▼

3

Ready from

12:00 PM

🕒

4

Pickup until

--:-- --

🕒

Optional: the last pickup time each day.

5

Customers can choose up to

14 pickup days ahead

▼

6

Most orders per pickup day

0

Full days drop off the list. 0 means no limit.

- 1 Orders after this time count as the next day. 11:59 PM means order by midnight.
- 2 How many days after the cutoff rule an order is ready. The next day is the default.
- 3 The time shown to customers and in emails, such as *from noon*. It tells the customer; it does not hold anything back.
- 4 An optional last pickup time. It must be later than Ready from.
- 5 How far ahead a customer can pick a day: 7, 14, 21, 30 or 60 pickup days. Only open days count.
- 6 Most orders for one day. 0 means no limit, up to 999. A full day drops off the list.

The Pickup tab: times.

1

Closed for pickup every

☒ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

2

Closed dates

2026-11-26

2026-12-25

2027-01-01

2027-01-04

Holidays and other days off, one per line, like 2026-12-25 or 12/25/2026. Customers can't choose them.

3

Pickup instructions

e.g. Pull around to the loading dock and ring the bell.

Shown at checkout and in order emails.

Customers see: Order by midnight and pick up the next day from noon. Closed Sundays.

- 1 Days you never do pickups. Sunday is ticked by default. You cannot close all seven.
- 2 Holidays and other days off, one per line, such as 2026-12-25 or 12/25/2026. Up to 60.
- 3 Where and how to pick up, up to 1000 characters. It shows at checkout and in the order and ready emails.

The Pickup tab: closed days and instructions.

⚠ CAREFUL

The Pickup tab's **Closed for pickup every** and **Closed dates** hold the same information as the **Closed days** and the weekly hours on your Store info screen. Each time you save Store info, Roadside rewrites these two Pickup fields from what Store info says, and anything you typed only here is lost. Keep your holidays and your weekly closed days on Store info (Chapter 3, Hours, closed days and contact details (page 18)), and treat these two fields as a place to read them.

Delivery

Delivery is off until you turn it on. When it is on, a customer chooses pickup or delivery at checkout. You can deliver to a list of ZIP codes, or to any address within a distance of your store. The three distance fields below apply only to the distance choice, and the ZIP list applies only to the ZIP choice.

1 Local delivery
☒ Deliver orders to customers nearby
 Customers choose pickup or delivery at checkout. Delivery is offered only to the ZIP codes below.

2 Where you deliver
☒ **Within a distance of the store**
 Measured in a straight line from the store's map location (Store info). The address is looked up on OpenStreetMap at checkout.
☐ **To these ZIP codes**
 Only addresses in the ZIP codes listed below.

3 Deliver within (miles)
 25
 For delivery by distance.

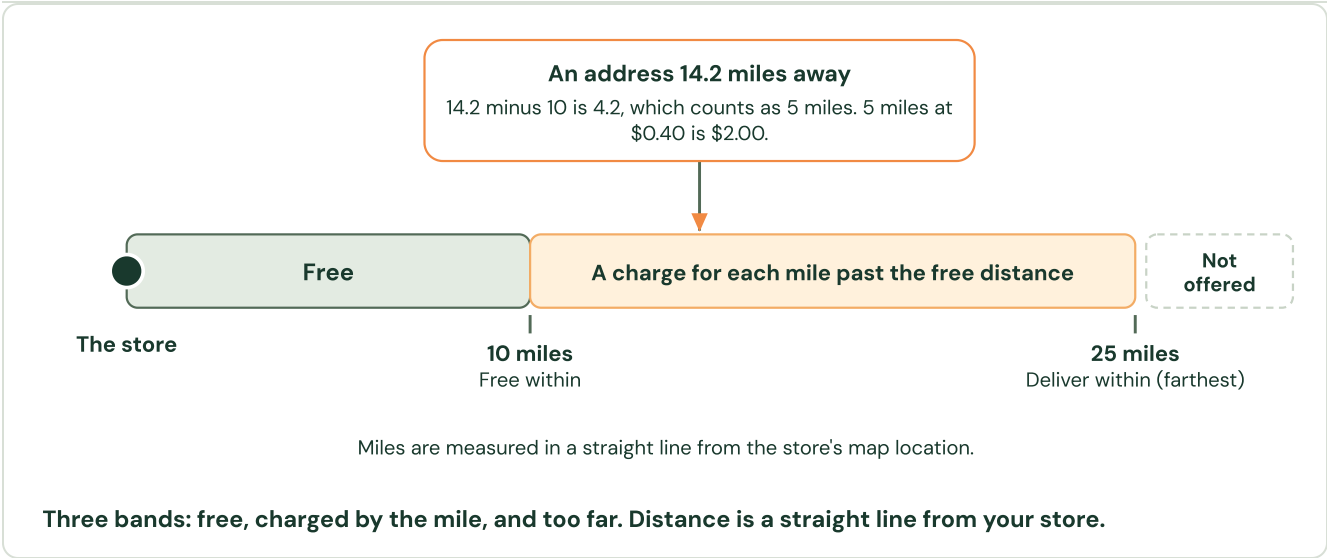
4 Free within (miles)
 10
 For delivery by distance. Inside this distance there's no fee. 0 means the fee applies everywhere.

5 Charge per mile past the free distance
 0.40
 For delivery by distance: each mile or part of one, on top of the delivery fee. Leave blank for none.

ZIP codes you deliver to
 32531 32567
 For delivery by ZIP code: 5-digit ZIP codes, separated by spaces, commas or new lines.

- 1** The master switch for delivery.
- 2** Within a distance of the store, or To these ZIP codes.
- 3** The farthest you go, from 1 to 100 miles. 10 by default.
- 4** No fee inside this distance. 0 means the fee applies everywhere. Above the farthest distance it counts as the farthest.
- 5** Each mile, or part of a mile, past the free distance. Blank means no per-mile charge.

The top of the Delivery tab, set to deliver by distance.



A delivery is free inside the free distance. Past it, the customer pays the **Delivery fee** if you set one, plus the per-mile charge for each mile or part of a mile beyond the free distance. With 10 miles free and \$0.40 a mile, an address 14.2 miles out is 5 miles past the free distance, so it costs 5 times \$0.40, which is \$2.00. Beyond the farthest distance the customer sees *That address is about 31 miles from the store, and we deliver within 25 miles. Please choose pickup, or call the store.* The delivery fee is never taxed.

 **CAREFUL**

Delivery by distance needs a **Map location** on your Store info screen. Without one, delivery is not offered at checkout, even with the switch on, and this tab does not warn you. After you turn delivery on, put something in a cart on your website and look for *Local delivery* at checkout. Roadside also leaves one hint on screen that does not fit distance: *Delivery is offered only to the ZIP codes below.* That line is true only for the ZIP choice.

Three more fields have no picture below, so here are their limits.

FIELD	DEFAULT	NOTES
Customers can choose up to	14 days ahead	7, 14, 21, 30 or 60.
Most deliveries per day	0, no limit	0 to 999. A full day drops off the list.
ZIP codes you deliver to	Blank	Only for the ZIP choice. 5-digit codes, separated by spaces, commas or lines, up to 300.

The screenshot shows a 'Delivery' settings form with the following sections and callouts:

- 1 Delivery fee:** A text input field containing 'Free'. Below it, a note says 'Leave blank for free delivery.'
- 2 Free delivery on orders over:** A text input field containing 'Never free'. Below it, a note says 'Before tax. Leave blank to always charge the fee.'
- 3 Smallest order to deliver:** A text input field containing 'No minimum'. Below it, a note says 'Before tax. Leave blank for no delivery minimum.'
- 4 Delivered after:** A dropdown menu showing 'The next day'. Below it, a note says 'Counted from the order cutoff on the Pickup tab.'
- 5 Deliveries go out on:** A row of checkboxes for days of the week: Sunday (unchecked), Monday (checked), Tuesday (checked), Wednesday (checked), Thursday (checked), Friday (checked), and Saturday (unchecked). Below it, a note says 'The store's closed dates (Pickup tab) are skipped too.'
- Customers can choose up to:** A dropdown menu showing '14 days ahead'.
- Most deliveries per day:** A text input field containing '0'. Below it, a note says 'Full days drop off the list. 0 means no limit.'
- 6 Delivery times:** A text input field containing 'between 9 AM and 5 PM'. Below it, a note says 'Shown to customers, like "between 9 AM and 5 PM".'
- 7 Delivery instructions:** A large text area containing 'We call before we come.' Below it, a note says 'Shown at checkout and in order emails. Customers see: Delivered within 25 miles of the store on Mondays, Tuesdays, Wednesdays, Thursdays and Fridays, between 9 AM and 5 PM. Free within 10 miles, then \$0.40 a mile past that.'

- 1** A flat amount. Blank means free. By distance it is charged once the address is past the free distance, along with the per-mile charge.
- 2** An order at or above this subtotal gets all delivery charges waived. Blank means never.
- 3** The smallest order you will deliver. Blank means no minimum.
- 4** Counted from the order cutoff on the Pickup tab.
- 5** The days deliveries go out. Monday to Friday by default. Closed dates are skipped too.
- 6** Shown to the customer, up to 80 characters. It is not enforced.
- 7** Shown at checkout and in the emails, up to 1000 characters.

The rest of the Delivery tab.

To turn delivery on, you must choose an area and at least one delivery day. Roadside refuses a save that has neither and says which is missing. A delivery order shows *Pay on delivery* where a pickup order shows *Pay at pickup*, and the customer must give a phone number the driver can use.

Payments

The Payments tab is where you choose how customers pay. Dirt Road connects your card processor and keeps its keys. You pick among the processors that are already connected and turn the other ways of paying on or off.

How customers pay

1 Card payments

Stripe, main store · Stripe · Live

Card numbers are typed only into the processor's own secure fields or page. They never reach this system.

2 If that processor is off or has a problem, use

None

Used only while the first one is turned off or needs attention, never because a card was declined.

3 ☐ Bank payments (ACH)

Customers can also pay from their bank account, through the card processor above, when it takes bank payments. The money takes about 4 business days to arrive. The order waits for it, and you get it to prepare once the bank pays.

4 ☒ Pay at pickup

Customers order now and pay at the counter: cash, card on the counter terminal, check or their charge account.

5 While online ordering is open, keep at least one way to pay turned on.

Save how customers pay

- 1 The connected processor that takes cards, or Off.
- 2 A second processor to use while the first is off or has a problem. It is never used because a card was declined.
- 3 Bank payments take about four business days to arrive. Off by default.
- 4 Customers order now and pay at the counter. Off by default.
- 5 Saves this card.

How customers pay.

While ordering is open, at least one way to pay must stay on. If you turn off the last one, the save is refused and the message says to turn on card payments or pay at pickup, or close ordering first. If your processor goes off or needs attention, a red message above the choices says where cards go instead.

Processors				
Processor	Mode	Status	Last checked	
1 Pay at pickup and counter payments Staff record the money at the counter · on	2 Live	3 Connected	Oct 7, 2026 10:37 AM	4 Open
Stripe, main store Stripe · takes cards	Live	Connected	Oct 7, 2026 11:05 AM	Open

- 1 Each processor, and whether it takes cards or is the fallback.
- 2 Live takes real payments. Test is for practice and moves no money.
- 3 Connected, Needs attention, Off or Disconnected. A reason shows when something is wrong.
- 4 Opens the processor's page, where you can press **Test connection** to check that it still answers.

The Processors table, and the Open link for each.

The **Needs attention** card beside the choices lists anything that needs a look: a processor with a problem, a payment issue on an order, or a practice order still open. Payment issues, in Chapter 19 (page 142) explains the issues. To add, replace or disconnect a card processor, write to **support@dirtroadsoftware.com** and say which one. Do not email keys or passwords.

Emails and policies

The second card of this tab, **Store policies**, has one box: **Returns, refunds and other policies**, up to 10,000 characters. Customers read it at checkout under the conditions described earlier in this chapter. The first card controls the emails.

Fill in **Email new orders to** before you open ordering. Until you do, a new order appears only on the screen. An alert says *New order W-1023 (\$82.00)* and carries a link that opens the order in Roadside. If an address is not valid, the save says *Enter valid email addresses for new-order alerts, separated by commas, or leave it blank.*

Roadside sends order emails from the address Dirt Road sets up for your store. If customers say they never received one, search the order by their email or phone number to confirm it exists, tell them the number and the pickup day by phone, and write to **support@dirtyroadsoftware.com**. There is no button to send an email again.

Emails

1 Email new orders to

orders@bakerfeedandcountrystore.com, dana@bakerfeedan

Up to 5 addresses, separated by commas.

2 ☒ Email customers when their order is ready

Customers always get a confirmation when they order, and a note if it's cancelled (when you choose to send one).

3 Sign-off for customer emails

Questions about your order? Call us at (850) 537-1000.

Added at the end of every email to customers, above the store name.

- 1

Up to 5 addresses, separated by commas. Blank by default, which means no new-order alerts.
- 2

On by default. Customers always get a confirmation when they order, and a note if you cancel with the box ticked.
- 3

Added to the end of every customer email, above your store's name. Up to 1000 characters.

The Emails card of the Emails & policies tab. The addresses shown are examples.

18 Working the orders

Online orders is your working list: what to pull, what is waiting at the counter and what is done. Open an order to mark it ready, take payment, print a pick ticket or cancel it.

IN THIS CHAPTER

- The list, its tabs and its two charts
- One order: what each badge and button means
- Taking an order from new to picked up
- The pick ticket you print
- Cancelling an order, and an item that is out of stock
- Closing for a holiday

The list of orders

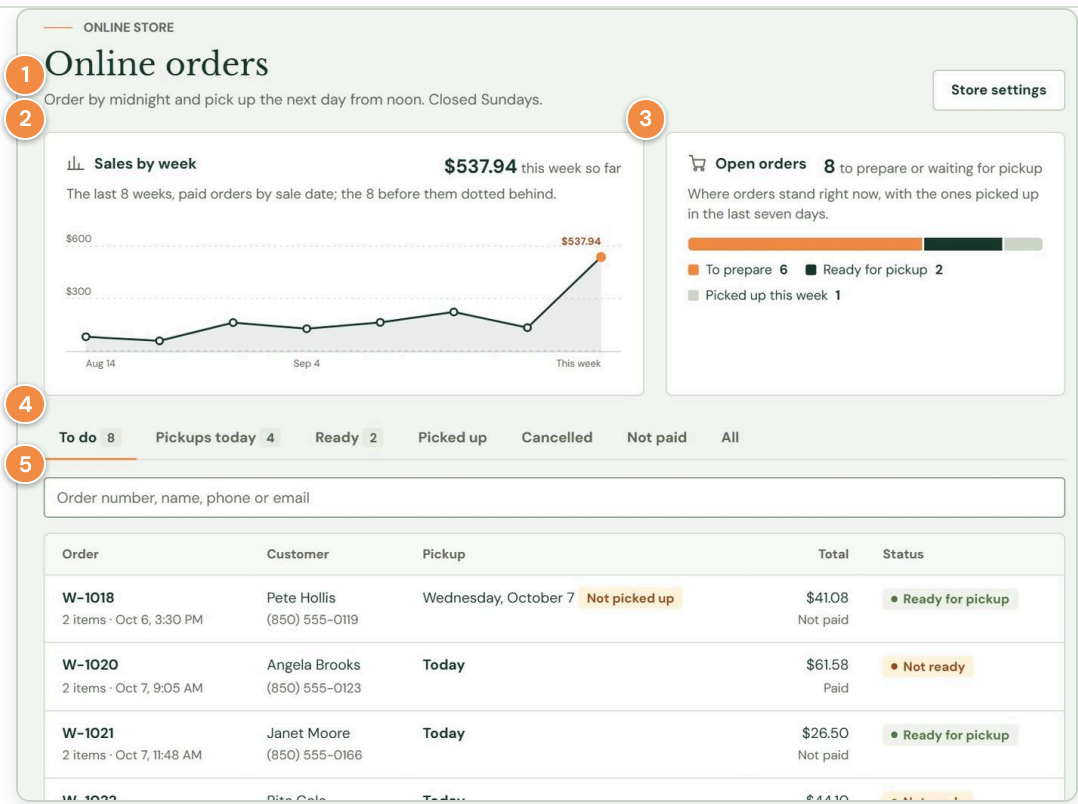
WHERE TO FIND IT **Online store** ›  **Online orders**

Store owner, Manager

Online orders opens on the **To do** tab. Staff can work the orders too. The line under the heading repeats your pickup rule, so you can see at a glance what customers were promised. When ordering is off, it says so instead.

The tabs, from left to right, show these orders.

TAB	WHAT IT SHOWS
To do	Every open order, ready or not, with the oldest pickup day first.
Pickups today	Open orders whose pickup or delivery day is today or earlier, so late ones show up here too.
Ready	Open orders you have marked ready.
Picked up	Finished orders, newest first. Delivery orders read <i>Delivered</i> .
Cancelled	Cancelled orders, newest first.
Not paid	Checkouts still waiting for payment, including bank payments on their way, and checkouts that ran out of time unpaid.
All	Everything except checkouts that are still waiting for payment.



- 1

Your pickup rule, in the words customers see.
- 2

Sales by week, the last 8 weeks. The charts appear once an order has been placed and paid.
- 3

Where orders stand right now: to prepare, ready for pickup and picked up this week.
- 4

The tabs. A small number shows on the first three when there is something in them.
- 5

Search by order number, name, phone or email. The list narrows as you type.

Online orders, with its two charts and its tabs.

1	Order	Customer	Pickup	2	3	Total	4	Status
	W-1018 2 items • Oct 6, 3:30 PM	Pete Hollis (850) 555-0119	Wednesday, October 7	Not picked up		\$41.08 Not paid		● Ready for pickup
	W-1020 2 items • Oct 7, 9:05 AM	Angela Brooks (850) 555-0123	Today			\$61.58 Paid		● Not ready
	W-1021 2 items • Oct 7, 11:48 AM	Janet Moore (850) 555-0166	Today			\$26.50 Not paid		● Ready for pickup
	W-1022 2 items • Oct 7, 1:22 PM	Rita Cole (850) 555-0188	Today			\$44.10 Not paid		● Not ready
	W-1023 2 items • Oct 7, 6:30 PM	Gene Whitaker (850) 555-0161	Friday, October 9			\$82.00 Not paid		● Not ready
	W-1024 1 item • Oct 7, 8:15 PM	Marcus Reed (850) 555-0147	Friday, October 9			\$40.20 Authorized		● Not ready

1 The order number, how many items, and when it was placed, in your store's time zone.

2 The pickup day. **Not picked up** in orange means the day has passed and the order is still open. The heading says Pickup even for a delivery order.

3 The total, with the payment word under it.

4 Where the order stands. An orange **Check** badge next to it means Roadside flagged the order. Open it to read why.

The rows of the To do tab.

A tab lists up to 200 orders; use the search box to find older ones. The list does not refresh by itself, so reload the page to see orders that arrived since you opened it. Search matches part of an order number, so *1022* finds *W-1022*. The search box at the top of every screen also finds orders, by number, name, business, email, phone, note, or the name or SKU of an item. An old unpaid checkout turns up only when you type its full order number.

Both charts count test orders, and Sales by week adds up each order's total, with tax and delivery, by the day the order was placed or paid. A pay-at-pickup order counts on the day it was placed, before the customer pays. Refunds are not taken off, and cancelled orders drop out.

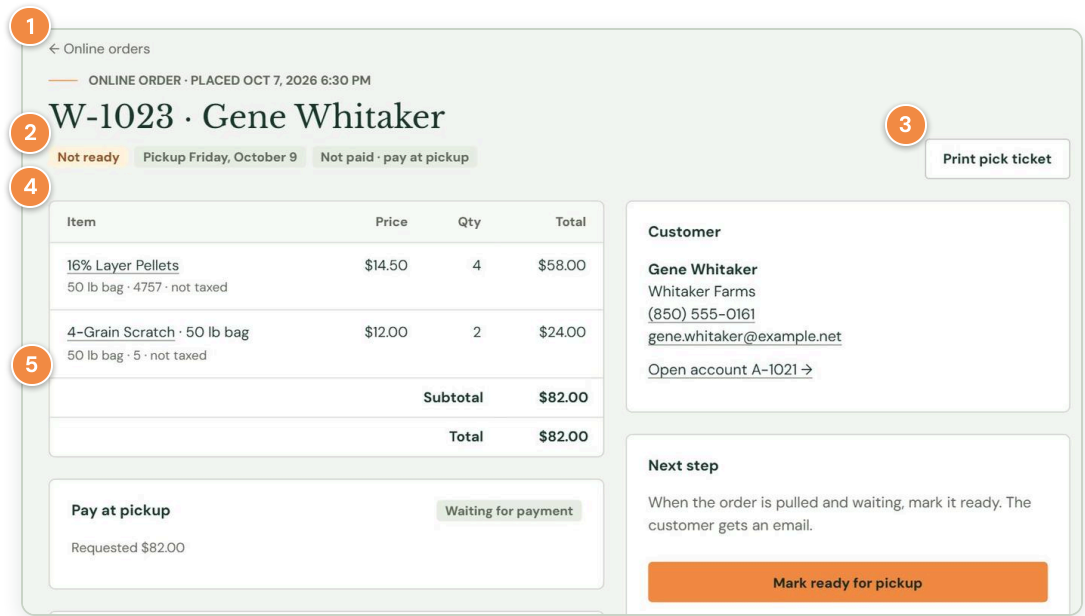
WORDS TO KNOW

Test order

An order paid through a practice card processor, marked **TEST**. No real money moves. If you find one, cancel it with **Cancel test order**, which puts the stock back.

One order

Press an order number to open it. The top of the page tells you the state of the order in a row of badges: whether it is ready, the pickup or delivery day, and the payment. Below that, on the left, are the items and totals, the payment, notes and the history. On the right are the customer and the buttons that move the order along.



- 1 Back to the list.
- 2 The order's state, its day and its payment. *Not paid · pay at pickup* means the customer will pay at the counter.
- 3 Opens the pick ticket in a new tab.
- 4 The items, with size and SKU. *Not taxed* appears under an item that carries no tax. Product names link to the product.
- 5 Subtotal, each tax, and the total. Once money is paid, a **Paid** line follows.

An order paid at pickup, not yet ready.

The words in the badges are worth knowing. The first badge is the order's state.

STATE	WHAT IT MEANS
Waiting for payment	A card or bank checkout has started. The items and the day are set aside. Not for you to prepare yet. It lives on the Not paid tab.
Not ready	The order is open and waiting for you to pull it. It may be paid, held on a card or waiting for payment at the counter.
Ready for pickup	You marked it ready. For a delivery order this reads <i>Ready for delivery</i> .
Picked up	It was handed over. Delivery orders read <i>Delivered</i> .
Cancelled	You cancelled it.
Not paid	The checkout ran out of time, or the bank sent a bank payment back. The items and day went back. A payment that arrives late reopens the order with a note.

The payment badge uses these words.

PAYMENT	WHAT IT MEANS
Not paid	Nothing has been taken. An open pay-at-pickup order adds <i>pay at pickup</i> .
Payment pending	A card or bank payment is still being processed. A bank payment takes days.
Authorized	The card is held, not charged.
Paid	Paid in full, online or at the counter. When the money went on the customer's charge account, the screen says <i>Charged to account</i> instead.
Partly refunded, Refunded	Some or all of the money went back.
Voided	The order was cancelled or timed out with nothing taken.

A delivery order has a line under the heading that reads *Deliver to 4410 Old Bethel Rd, Baker 32531 · fee \$2.00*, followed by the driver's note. The fee is inside the total, but the table of items has no row for it. The button on the right still says **Mark ready for pickup**, and the customer's email says delivery. Finishing the order reads **Delivered and paid**.



1 Note from the customer

Loading into a flatbed. We will be there around 4.

2 Staff note

Gene likes the bags stacked at the dock door.

Save note

3 History

Ordered online; paying at pickup. Oct 7, 6:30 PM

- 1** What the customer typed at checkout.
- 2** For your own use. It is not shown to the customer and it prints on the pick ticket.
- 3** Every event, with who did it and when.

The customer's note, your staff note and the history.

The staff note holds up to 2000 characters. Press **Save note** to keep it. Orders cannot be edited: there is no way to change an item, add a line or enter a phone order by hand, and there is no delete. To fix an order that is wrong, cancel it and have the customer order again, or refund what is missing (see Refunds, in Chapter 19 (page 143)).

Take an order from new to picked up

The same steps work for every order. Only the payment differs.

- 1 Find the order.** A new order shows on Website home under **Online orders to prepare**, in an email if you set up alerts, and under **To do**.
- 2 Print the pick ticket.** Press **Print pick ticket**, then **Ctrl + P** in the new tab. Pull the items and tick each box.
- 3 Mark it ready.** Press **Mark ready for pickup** in the **Next step** box. The badge turns green and the customer gets an email, if **Email customers when their order is ready** is on.
- 4 When the customer arrives, open the order.** Search by number, name or phone, or use the **Ready** tab.
- 5 Take the payment and finish.** If the customer paid online by card, press **Picked up**. If the customer pays now, choose how from **Paid at pickup by**, then press **Picked up and paid**.

Next step

When the order is pulled and waiting, mark it ready. The customer gets an email.

- 1 **Mark ready for pickup**
- 2 Paid at pickup by (\$82.00)
Cash
- 3 **Picked up and paid**

- 1 Moves the order to Ready and emails the customer.
- 2 Cash, Card at the counter, Check or Charged to account.
- 3 Records the payment and marks the order picked up in one press.

The Next step box of a pay-at-pickup order.

Card at the counter means you run the card on your own machine first. Roadside does not talk to that machine, so it only records that the customer paid that way. Pressing **Picked up and paid** records the whole amount due. There are no part payments. If you forgot to choose a way, Roadside says *Choose how the customer paid*. Marking an order picked up sends no email.

When the customer paid at the counter before the pickup day, record it first and finish later. The **Record a payment** box appears on a pay-at-pickup order while money is still due.

Record a payment

The customer paid \$44.10 at the counter before picking up.

- 1 Paid by
Check
- 2 Check number or note (optional)
1042
- 3 **Record payment**

- 1 How the customer paid.
- 2 A check number or a short note, up to 120 characters. Roadside refuses anything that looks like a card number and tells you to use a check number or a short note instead.
- 3 Records the full amount. The message reads *Payment recorded: \$44.10*.

Recording a payment taken at the counter.

The pick ticket

The pick ticket is a plain page you print and tape to the order while you pull it. It has the customer's name and phone, the pickup or delivery day, the total and what is due. Then comes a table of items with a box to tick for each, any customer note and staff note, and a line for who pulled the order and who handed it over. Print it with **Ctrl + P**. It has no print button of its own.

1

2

3

Pick ticket · W-1023

Gene Whitaker · Whitaker (850) 555-0161

Pickup: Friday, October 9 · Total: \$82.00 (due at pickup: \$82.00)

✓	Qty	Item	Size	SKU
	4	16% Layer Pellets	50 lb bag	4757
	2	4-Grain Scratch (50 lb bag)	50 lb bag	5

Customer note: Loading into a flatbed. We will be there around 4.

Staff note: Gene likes the bags stacked at the dock door.

Pulled by: _____

Picked up by: _____

- 1

2
- 3
- Who, when, the total, and what is due at pickup or on delivery.

One row for each item, with a box to tick and the size.

Space for the people who pulled and handed over the order. It sits below the notes.

The pick ticket for an order.



Cancel an order

You can cancel any open order that has not been picked up. A checkout that is still waiting for payment cannot be cancelled by hand; it expires on its own. An order that was picked up is refunded instead.

1

2

3

Cancel order

Reason

Customer called to change the order.

☒ Email the customer

Cancel order

- 1

2

3
- Your reason, up to 300 characters. It goes into the customer's email, so write it for the customer.

Ticked by default. Untick it when you have already talked to the customer.

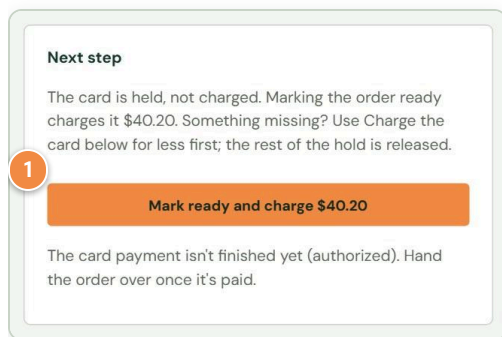
Asks you to confirm, then cancels.

Cancelling an order.

When you cancel, the items go back on the shelf, the pickup day opens up and the customer's email says why. Money is handled for you. A held card is released, a charged card is refunded, and the screen says so. If money was taken at the counter, Roadside asks how you gave it back. Staff can cancel an order only if no money is on it. Store owners and Managers can cancel any open order.

Charge a held card for what you have

When a store holds cards at checkout, an order opens as *Authorized*. The money is on hold, not taken. The **Next step** box says so and offers **Mark ready and charge** with the full amount.



Next step

The card is held, not charged. Marking the order ready charges it \$40.20. Something missing? Use Charge the card below for less first; the rest of the hold is released.

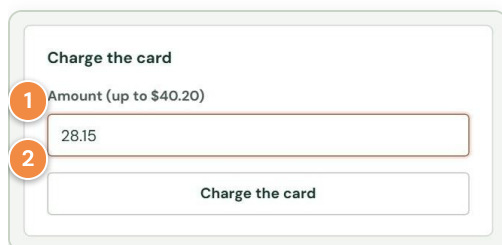
1 Mark ready and charge \$40.20

The card payment isn't finished yet (authorized). Hand the order over once it's paid.

- 1** Charges the card for what is still owed, marks the order ready and emails the customer.

The Next step box for an order with a held card.

- 1 Pull the order.** If everything is on the shelf, press **Mark ready and charge** and confirm. Roadside charges the card and marks the order ready.
- 2 If something is missing, charge less first.** In the **Charge the card** box, type the smaller amount and press **Charge the card**. The rest of the hold is released at once.
- 3 Wait a minute.** The payment box reads *Paid* once the charge goes through.
- 4 Mark the order ready.** Press **Mark ready for pickup**, and finish the order with **Picked up** when the customer arrives.



Charge the card

1 Amount (up to \$40.20)

2 28.15

Charge the card

- 1** Already filled in with the most you can charge. Type less when an item is missing.
- 2** Charges that amount and lets go of the rest of the hold.

Charging for less than the hold.

Leave a held card alone and Roadside reminds you on day 5, then releases the hold itself at about day 6.5. Holds, in Chapter 19 (page 139) has the details.

An item is out of stock

You cannot remove a line from an order or take a smaller payment. What you do depends on how the customer is paying.

HOW THE ORDER IS PAID	WHAT TO DO
Held card	Charge less first, as above. The customer pays only for what you have.
Card, already charged	Hand over what you have and refund the missing item. In Refund to the card , type the amount, choose <i>Out of stock</i> as the reason and press Refund . The money reaches the customer in several days. Type the item's price plus its tax yourself; Roadside does not work it out.
Pay at pickup	Call the customer. If the customer still wants the rest, collect the right amount at the counter, choose how they paid and press Picked up and paid . That records the full amount, so then open Refund at the counter , type the missing item's price plus tax, choose <i>Out of stock</i> , choose how you gave it back and press Record refund . If the customer would rather not take a partial order, cancel it.

A refund does not put the item back on the shelf unless you list the item under **Items coming back** and leave **Put them back in stock** ticked. For an item that was never there, do not tick it. Fix the count on the product with a stock count instead (Chapter 13, Stock (page 90)).

Close for a holiday

There are two ways to close, and they do different things.

- 1 To close particular days, add them to Store info.** Go to **Website, Store info**, add the date under **Closed days** with a label such as Christmas Day, and save (Chapter 3, Hours, closed days and contact details (page 18)). Your website shows the day as closed, pickup orders skip it and delivery skips it too. Nothing else changes, so customers can still order for the days around it.
- 2 To stop all online ordering, turn the switch off.** Go to **Online store, Store settings, General**, untick **Customers can order online** and press **Save general settings**. Write a **Message while ordering is off** if you want customers to read something other than the standard one.

Choose **Browse only** instead when you want customers to keep seeing prices with no cart.

Either change reaches your website within a few minutes. While ordering is off, the website keeps its call-to-order wording and shows no cart. Orders already placed stay as they are, and you still prepare them. Turn ordering on again the same way.

19 Payments, holds and refunds

Your card processor moves the money, and Roadside keeps the record on each order. This chapter explains how a customer's payment works in plain words, how it shows on the order, and how to give money back.

IN THIS CHAPTER

- The ways a customer can pay, and what each one does to an order
- Holds: setting money aside, then charging what you have
- Bank payments, and why those orders wait
- Reading the payment box on an order
- Payment issues and disputes
- Refunds, and what a refund does to stock

The ways a customer can pay

You choose which ways to offer on the Payments tab of Store settings (Payments, in Chapter 17 (page 125)). A customer sees only the ones you turned on.

WAY	WHAT HAPPENS
Card, charged at checkout	The card is charged when the customer pays. The order opens as <i>Paid</i> .
Card, held	The card is held, not charged. You charge it when you confirm the order. The order opens as <i>Authorized</i> .
Bank account	The money comes straight from the customer's bank, which takes about four business days. The order waits until it arrives.
Pay at pickup	The order opens at once. The customer pays at the counter, or to the driver, and you record how.

WORDS TO KNOW**Card processor**

The company that handles card payments for your store, such as Stripe or Clover. It is your own account with it, with its own fees and dashboard. Roadside never sees or stores card numbers. A customer types a card into the processor's secure fields.

Hold

Money set aside on a customer's card without taking it. The customer sees it as pending.

Dirt Road connects your card processor to Roadside and keeps its keys. To start taking cards, to change processors or to fix a connection, write to support@dirtyroadsoftware.com. What you pay Dirt Road Software for Roadside is a separate matter from what customers pay you. Chapter 25, Account and Billing (page 202) covers your invoices.

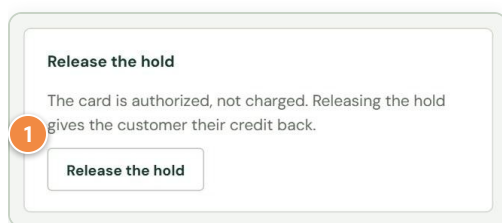
Holds

A store that holds cards turns on **Hold the card at checkout, and charge it when you confirm the order** on the Checkout tab. The customer's card is held for the full amount. You find out what you actually have on the shelf when you pull the order, then charge the card for exactly that. The customer pays for what they take home.

A hold lasts about seven days. Roadside never charges a held card unless you press a button.

You decide what happens to a hold in one of three ways. **Mark ready and charge** charges the card for what is owed and marks the order ready. **Charge the card** charges an amount you type, up to the hold, and lets go of the rest at once (see Charge a held card for what you have, in Chapter 18 (page 136)).

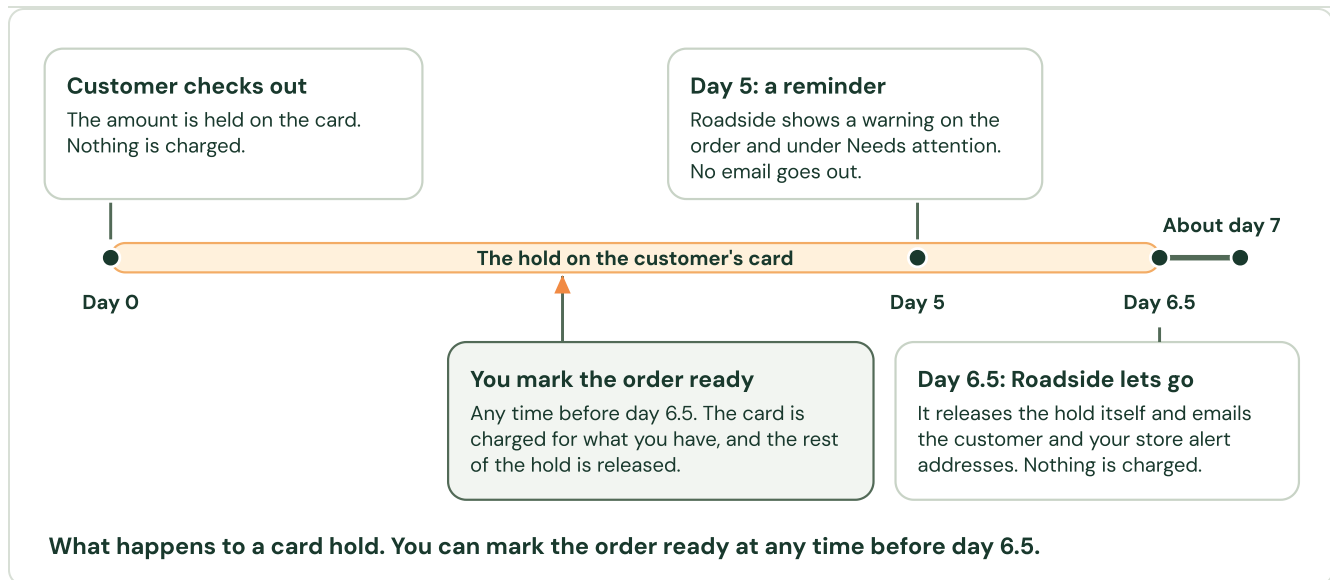
Release the hold gives the customer their credit back without taking anything. Nothing shows on the customer's statement afterward. The order stays open and unpaid, so collect payment another way.



- 1 Asks you to confirm, then releases the hold.

The Release the hold box.

If you do nothing, day 5 brings a warning on the order's payment box and on the **Needs attention** card of the Payments tab. No email goes out and no badge shows on the list, so look at those two places. At about day 6.5 Roadside releases the hold itself, because the card's own hold is about to lapse, and emails the customer and the addresses you set for new-order alerts. The customer is told to call or pay at pickup. Your order stays open.



Bank payments cannot be held. If you turn holds on, a customer who pays by bank account is charged at checkout.

Bank payments

A bank payment, which the screens call ACH, takes money from the customer's bank account instead of a card. It is off until you turn it on. It works through Stripe and not through Clover.

The money takes about four business days. While it is on its way, the order reads *Payment pending* and its stock stays set aside. It does not appear on the To do tab, so you do not pull it, until the bank pays. Then the order opens as Paid, you get it to prepare and the customer gets a second email. If the bank sends the payment back, the order becomes *Not paid*, nothing was taken, the items go back on the shelf, and Roadside emails the customer and the addresses you set for new-order alerts.

Pay at pickup

Pay at pickup is off until you turn it on. An order paid this way opens as soon as the customer places it, with the stock taken off the shelf and the pickup day booked. You record the payment when the customer comes in, or sooner if the customer paid you ahead of time (see Take an order from new to picked up, in Chapter 18 (page 133)). The ways to record it are Cash, Card at the counter, Check and Charged to account.

Card at the counter means you ran the card on your own machine. Roadside records that it happened and does not talk to the machine. Charged to account means the amount went on the customer's charge account with you. Roadside counts the order as paid, but the order reads *Charged to account*

where other orders read *Paid*.

How a payment shows on the order

Each payment on an order has its own box. The heading says how the customer paid, such as *Card · Visa ending 4242 · Stripe*, *Pay at pickup* or *Charged to account*. A short line under it adds up the amounts: what was requested, held, paid and refunded. Roadside keeps only the brand and last four digits of a card.

1

2

3

4

Card · Visa ending 4242 · Stripe

Authorized

Requested \$40.20 · Held \$40.20

ATTEMPT

Stripe, main store · Stripe Live

Authorized · Visa ending 4242

payment `pi_e16fb3859e5b3917`

Oct 7, 8:15 PM

LEDGER

When	What	Amount	Status	By
Oct 7, 8:15 PM	Authorized	\$40.20	Done	the customer

1

2

3

4

How the customer paid and which processor took it.

Authorized, Paid, Partly refunded or Refunded.

The processor, whether it is live or in test, and the card's brand and last four digits. A link to the processor's own page appears when it has one.

One row for each thing that happened to the money.

The payment box of an order with a held card.

The ledger reads *Authorized*, *Charged*, *Released*, *Refunded*, *Paid at the counter (check 1042)*, *Charged to account* and similar. Its status reads *Waiting to send*, *Sent*, *Pending*, *Done*, *Failed* or *Cancelled*. The last column says who did it: the customer, the processor, a name from your team, or Roadside. A card that was tried more than once folds its attempts into a line such as *3 attempts*.

A charge takes about a minute to show as *Paid*. A refund shows as *Pending* until the processor confirms it.

Dirt Road Software

141

Payment issues

When something about a payment does not add up, Roadside opens a payment issue. It shows in the order's payment box, with a bold title and the words *Roadside expected* and *It saw*, and under **Needs attention** on the Payments tab. The order carries an orange **Check** badge in the list. The common titles are these.

TITLE	WHAT IT MEANS
We don't know whether a card was charged	The processor's answer was lost. The order waits until you settle it.
The amount paid doesn't match the order	The processor took a different amount than the order total.
The customer paid twice	Two payments landed. Refund one of them.
A refund or other action hasn't finished	A refund, charge or release was sent and has not been confirmed.
A card hold is about to run out	The day 5 warning.

Store owners and Managers settle an issue with the buttons in the payment box. Staff see *A manager can settle this*. Press **Check again** first, which asks the processor once more. If it still cannot say, look in the processor's own dashboard for the payment. If the customer was charged, press **It was charged** and paste the payment's id exactly as the dashboard shows it. If not, press **Not charged** and type how you checked. Roadside allows that only once the payment is five minutes old, because the processor may not show it yet. **Mark resolved** closes any other issue and asks for a note.

CAREFUL

The orange **Check** badge does not clear by itself, except for *We don't know whether a card was charged*, which clears when you settle it. A flag such as *Paid, but some items went out of stock meanwhile* stays on the order. Read it, deal with the shelf, and ignore the badge afterward.

A **dispute** is the customer's bank asking for the money back. With Stripe, the order is flagged *The customer's bank opened a dispute. Answer it in Stripe.*, the payment box shows the reason and a due date, and Roadside emails the addresses you set for new-order alerts. You answer in Stripe's own dashboard before that date. Roadside cannot answer for you. Clover does not report disputes to Roadside, so watch for them in Clover.

Refunds

A refund gives back money that was already charged. It takes several days to reach the customer's statement. Store owners and Managers can refund. Staff cannot. A refund goes back to the way the customer paid: **Refund to the card** for a card or bank payment, and **Refund at the counter** for money taken at the counter. The box sits in the right-hand column of the order.

The screenshot shows a form titled "Refund to the card". It contains the following elements:

- 1** Amount (up to \$61.58): A text input field containing "4.75".
- 2** Reason: A dropdown menu with "Out of stock" selected.
- 3** Note: A text input field.
- 4** A button labeled "Refund" at the bottom of the form.

- 1** Up to the amount paid. You may refund part. Type the amount yourself.
- 2** Customer asked, Order cancelled, Out of stock, Charged twice, Tax exemption shown or Other.
- 3** A note for your records, up to 500 characters.
- 4** Asks you to confirm, then sends the refund.

The Refund to the card box.

- 1** **Open the order.** Use the **Picked up** tab for one that is finished.
- 2** **Fill in the refund box.** Type the **Amount**, choose a **Reason** and write a **Note**. The amount is not filled in for you and does not follow what you pick under **Items coming back**, so add the item's price and its tax yourself. For money taken at the counter, also choose **Given back by** and, if it helps, a check number or short note.
- 3** **Press Refund** (or **Record refund** at the counter) and confirm. The message reads *Refund of \$4.75 sent to Stripe. It shows as done once Stripe confirms it.*
- 4** **Watch the payment box.** The refund row moves from *Waiting to send* to *Pending* to *Done*. A partial refund makes the order read *Partly refunded*.

Card · Visa ending 4242 · Stripe

Partly refunded

Requested \$61.58 · Paid \$61.58 · Refunded \$4.75

ATTEMPT

Stripe, main store · Stripe Live

Paid · Visa ending 4242

payment pi_7082c75bfafcd4e4

refund re_4b1b79bd1e9d2830

Oct 2, 4:20 PM

1 LEDGER

When	What	Amount	Status	By
Oct 2, 4:20 PM	Authorized	\$61.58	Done	the customer
Oct 2, 4:20 PM	Charged	\$61.58	Done	the customer
Oct 5, 10:15 AM	Refunded	-\$4.75	Done	Marcia Dowling

2

REFUNDS

Refund · Customer asked (done)

Brought the lead rope back with the receipt.

-\$4.75

- 1 The refund is a row of its own, with a minus amount and the name of the person who made it.
- 2 The reason and your note.

A card payment after a part refund.

A refund does not email the customer. The processor may send its own receipt. If the customer is waiting to hear, tell them.

On a picked-up order the refund box has an **Items coming back (optional)** group, with a quantity for each line, and a ticked box **Put them back in stock**. Roadside counts those items as returned and, with the box ticked, puts them back on the shelf. A refund with no items listed changes no stock. A refund on an order that has not been picked up does not cancel it and does not touch the stock. To cancel an order and send its payment back, use **Cancel order**, which puts the items back and refunds or releases the money for you (Cancel an order, in Chapter 18 (page 135)).

If a payment cannot be refunded through Roadside, the box says *This payment can't be refunded through Roadside. Refund it with the processor directly.*



PART 5

Customers and marketing

Keep your customers, your list, your articles and your numbers in one place.

20 Customer accounts and contacts

Roadside keeps one record for each customer: the people on it, your notes, and their online orders. This chapter covers finding a customer, adding one, logging a call, and putting an old account away.

IN THIS CHAPTER

- Finding a customer
- One account's page
- Adding and changing an account
- The people on an account
- Notes and the timeline
- Farm profile and compliance documents
- Archiving, restoring and exporting
- Accounts that come from online orders

Find a customer

WHERE TO FIND IT  **Customers** ›  **Accounts**

Store owner, Manager, Staff

A household, a ranch or a business is one account. The people on it are its contacts. A cattle operation might be one account with the owner, the bookkeeper and the ranch hand as contacts, so the person who calls in the order and the person who pays the bill end up in the same place.

WORDS TO KNOW

Account

One customer, business, household or vendor. It holds a name, phone, email, addresses, notes and a number such as A-1009.

Contact

A person on an account, with their own phone and email.

Tag

A short word you add to an account, such as *chick days* or *delivery*, so you can find that whole group later with the search box.

Account type

Customer, Prospect, Vendor or Other. A prospect is someone you hope to sell to. A vendor is a company you buy from.



The list is in alphabetical order, 25 accounts to a page. Type in the search box and it narrows as you type. It looks at the account name and number, phone numbers written any way (8505550172, 850-555 and (850) 555-0172 all match), email, website, street address, state, tags, notes, and the names, emails and phones of the contacts on the account. A customer who calls and gives only a mobile number can still be found: Wade Holloway's number is on his contact record, and typing it brings up the Holloway Cattle Co. account.

CUSTOMERS & ACCOUNTS

Accounts

20 active accounts

1

2

All 20

Customers 17

Prospects 1

Vendors 1

Others 1

3

Name, number, phone, email, contact, address, state or tag

All statuses

☐ Archived

4

Account ↑	Type	Primary contact	Phone	Location	Rep
Bellamy Stables A-1010 · horses, boarding	Customer	Carla Bellamy	(850) 555-0124	Holt, FL	Dana W
Crenshaw Family Farm A-1011 · chick days, poultry	Customer	Ruth Crenshaw	(850) 555-0138	Crestview, FL	Dana W
Dunn Dairy A-1013 · dairy, delivery	Customer Exempt	Pearl Dunn	(850) 555-0182	Milton, FL	Dana W
Ellis Hunting Club	Other	Gene Ellis	(850) 555-0191	Holt, FL	Dana W

5

Export CSV

+ New account

1

Narrow the list to one type. A type with no accounts has no button.

2

Type any part of a name, number, phone, email, address, state or tag.

3

Show only Active, On hold or Inactive accounts. Tick **Archived** to see accounts you have put away.

4

Press a name to open the account.

5

Export your accounts, or start a new one.

The Accounts list.

Dirt Road Software

147

Under each name is the account number and its tags. The **Type** column also shows an amber **On hold** or grey **Inactive** badge when the status is not Active, and a green **Exempt** badge for a tax-exempt account. **Rep** is the person on your team who looks after the account. Press **Account**, **Type** or **Location** at the top of a column to sort by it.

GOOD TO KNOW

The **Find anything** box at the top of every screen also finds accounts, contacts and notes. Press  from any screen to jump to it. Tick **Include archived** on the full search page to look through accounts you put away.

Customers > Contacts lists the people across every account in one place, in order by last name, with a search box at the top. It is the quicker way to answer a call from someone whose business name you do not remember. It shows the first 200 people, so narrow it with the search.

One account's page

WHERE TO FIND IT  **Customers** >  **Accounts**

Store owner, Manager, Staff

Press an account's name to open its page. The top shows the number, type, status and tags. Everything else is in cards: your contact details and notes on the left, the people and the timeline on the right.

More cards appear below Overview when they apply. **Email list** shows whether the account's email address is on your email list. **Online orders** shows the last five orders with their pickup day, total and status. **Farm profile**, **Delivery**, **Compliance documents** and **Compliance** appear when your plan includes the Feed & Seed pack, covered further on.

← Accounts

A-1009 · CUSTOMER

Holloway Cattle Co.

CustomerActiveTax exemptcattledeliverymineral program

1EditArchive

2

Overview

Phone(850) 555-0171

Emailorders@hollowaycattle.example.net

Website—

Sales repDana Whitfield

Billing address4410 Old Bethel Road
Baker, FL 32531
US

3Delivery addressSame as billing

Wade pays on the 10th. Call before delivering, the second gate sticks.

4

Contacts

+ Add

WHWade HollowayPrimary
Authorized buyer
Owner · (850) 555-0172

DH Dottie Holloway
Bookkeeper · (850) 555-0173 ·
dottie@hollowaycattle.example.net

RP Ray PruittAuthorized buyer
Ranch hand · (850) 555-0174

5

Timeline

1Edit changes the account. Archive puts it away (see below).

2Phone, email, sales rep and addresses. On a phone, pressing the number calls it.

3Internal notes, in the grey box. Customers never see them.

4The people on this account.

5Your calls, visits and notes, newest first.

An account's page.

Add an account

WHERE TO FIND IT

Customers

Accounts

New account

Store owner, Manager, Staff

Add an account when a customer asks you to keep them on file: someone who wants a house account, a ranch you deliver to, a vendor whose rep calls on Thursdays. Customers who order online get an account on their own, and a later section explains how.

Dirt Road Software

149

- 1 The name is required.
- 2 Customer, Prospect, Vendor or Other.
- 3 Active, On hold or Inactive.
- 4 Separate tags with commas.
- 5 Marks the account as tax exempt.

The top of the New account form.

- 1 **Press New account** on the Accounts list. The **New** button at the top of every screen does the same: choose **Account**.
- 2 **Type the account name.** It is the only required field.
- 3 **Choose a type and status.** Customer and Active are right for most accounts. Add a phone, an email and a website. If you leave `https://` off the website, Roadside adds it.
- 4 **Check the sales rep.** It starts as you. Change it to whoever on your team looks after this customer.
- 5 **Add tags,** separated by commas. An account can have up to 12.
- 6 **Tick Tax exempt** for an account that does not pay sales tax. The list shows an Exempt badge.
- 7 **Fill in the billing address.** Leave **Delivery address is the same as billing** ticked, or untick it and enter where you deliver. The second line suits directions such as a gate code or barn.
- 8 **Write internal notes** if you want them, up to 4,000 characters, then press **Create account**.

Roadside gives the new account the next number (A-1022, A-1023 and so on) and writes *Account created.* at the bottom of its timeline. To change an account later, press **Edit** on its page. If two people have the same account open and one saves first, the other sees *Someone else saved this account while you were editing. Reload to see their changes.* Reload the page and make the change again.

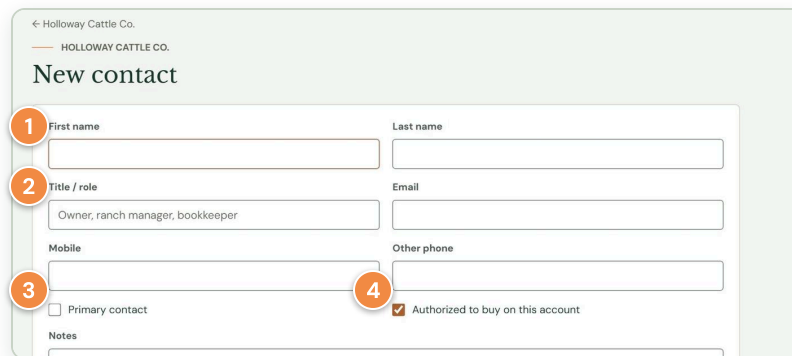
On hold and **Inactive** are flags for you and your staff to see. Roadside does not stop an order or a sale because of them. A common use is **On hold** while a balance is overdue, so whoever is at the counter checks with you first.

The people on an account

WHERE TO FIND IT  **Customers** ›  **Accounts** › **an account**

Store owner, Manager, Staff

Open the account and press **Add** in the Contacts card. Type a first name, a last name or both. One of them is required, and everything else is optional.



1 First and last name. One of the two is required.

2 What they do for the account, such as owner, ranch manager or bookkeeper.

3 The person you call first. Only one contact per account is primary.

4 Ticked means this person may buy on the account.

Adding a contact.

The first contact you add becomes the primary contact. If you tick **Primary contact** on someone else, the mark moves to them. **Authorized to buy on this account** starts ticked. Untick it for a person who calls with questions but should not be buying on the house account, such as the bookkeeper. The **Notes** box holds up to 2,000 characters about the person.

To change a contact, press the pencil beside the name. To take a person off the account, open them and press **Remove contact**. A removed contact disappears from the lists and from search, and no screen brings it back, so remove people only when you are sure.

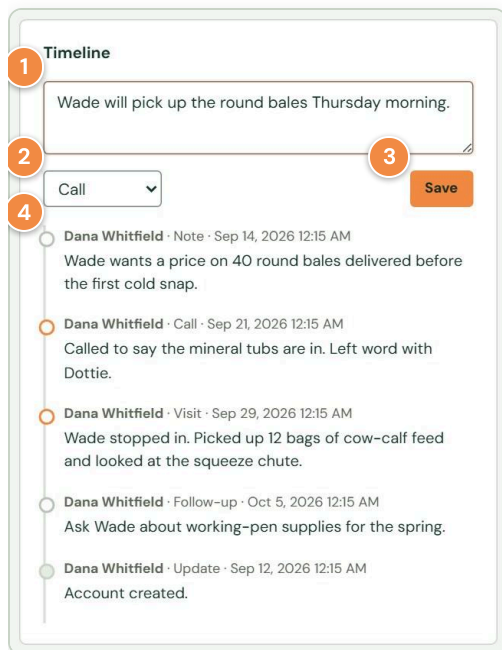
Notes and the timeline

WHERE TO FIND IT  **Customers** >  **Accounts** > **an account**

Store owner, Manager, Staff

The timeline is the account's memory. Log a call when it happens, and the next person who opens the account knows what was said.

- 1 **Click in the box** that says *Log a call, visit or note...* and write what happened. It holds up to 4,000 characters.
- 2 **Choose what kind of entry it is:** Note, Call, Visit, Email or Follow-up.
- 3 **Press Save.** The entry goes to the top of the list with your name, the kind and the time.



The screenshot shows the 'Timeline' interface. At the top, there is a text input field (1) with the placeholder text 'Wade will pick up the round bales Thursday morning.' Below this is a dropdown menu (2) currently set to 'Call'. To the right of the dropdown is a 'Save' button (3). Below the form is a list of entries (4) with the following details:

- Dana Whitfield · Note · Sep 14, 2026 12:15 AM**
Wade wants a price on 40 round bales delivered before the first cold snap.
- Dana Whitfield · Call · Sep 21, 2026 12:15 AM**
Called to say the mineral tubs are in. Left word with Dottie.
- Dana Whitfield · Visit · Sep 29, 2026 12:15 AM**
Wade stopped in. Picked up 12 bags of cow-calf feed and looked at the squeeze chute.
- Dana Whitfield · Follow-up · Oct 5, 2026 12:15 AM**
Ask Wade about working-pen supplies for the spring.
- Dana Whitfield · Update · Sep 12, 2026 12:15 AM**
Account created.

- 1 What happened, in your own words.
- 2 The kind of entry.
- 3 Press Save to add it to the timeline.
- 4 Earlier entries, newest first. The last 50 show.

Logging a call.

CAREFUL

A saved entry cannot be edited or deleted. Write it the way you would want to read it later. **Follow-up** is only a label on the entry. Roadside does not remind anyone, so put a real follow-up on your own calendar too.

Roadside also writes entries itself. They show *System* as the person: *Account created.*, and a line for each online order, such as *Online order W-1002: \$74.50, pickup Thursday, October 8.*

Farm profile and compliance documents

This appears when your plan includes the Feed & Seed pack. The pack adds the details a feed store tracks about a farm customer, in cards on the account's page and in the same Edit form.

CARD	FIELDS
Farm profile	Operation type (cow-calf, dairy, equine, poultry, swine, sheep and goats, row crops, hay and forage, hobby farm and others), Head count, Acreage, Payment terms (Cash / card, Net 30, Due on statement, Seasonal), Credit limit (\$)
Delivery	Preferred delivery day, and Gate code / directions
Compliance documents	Ag exemption number, state and expiry date; VFD veterinarian and expiry date; Restricted-use license number and expiry date

 WORDS TO KNOW

Ag exemption

A farm sales-tax exemption certificate. The customer gives you its number and the date it runs out.

VFD

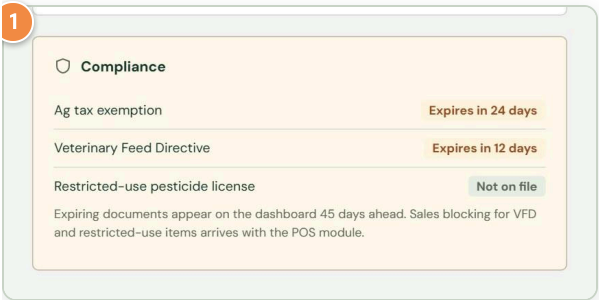
Veterinary Feed Directive. A written order from a veterinarian that a customer needs before you can sell certain medicated feed.

Restricted-use license

A state license a customer needs to buy restricted-use pesticides.

Payment terms and credit limit are notes. Roadside keeps them on the account where your staff can see them. It does not collect on terms or stop an order that goes over the limit.

The **Compliance** card on the account's page shows each document as *Not on file*, *Valid to a date*, *Expires in* a number of days, or *Expired* with the date. Roadside warns you 45 days ahead and lists the soonest on Website home. It tracks the dates. It does not block a sale at the register or on the website. Chapter 15, Compliance watch and Pricing check (page 102) covers the Compliance watch list that gathers every customer's expiring documents.



1 One line for each document. Amber means a document is close to expiring or has expired.

The Compliance card on a ranch account.

Archive an account, and bring it back

WHERE TO FIND IT  **Customers** ›  **Accounts** › **an account**

Store owner, Manager

Roadside never deletes an account. When a customer closes or moves away, **archive** the account instead. It leaves your lists and search results, and its notes, contacts and orders stay exactly as they were.

1 **Open the account** and press **Archive**.

2 **Confirm.** Roadside asks *Archive this account? It will be hidden from lists.* and then says *Account archived. It is hidden from lists but nothing was deleted.*

To find it again, tick **Archived**, beside the status list at the top of the Accounts list. An archived account shows a grey **Archived** badge and a **Restore** button. Press it and the account is back in the lists with *Account restored*. Staff can open an archived account but cannot archive or restore one.

Archiving removes an account, not a person. To drop one person from an account, use **Remove contact**. To stop emailing someone, use **Unsubscribe** on the email list, covered in Chapter 21, The email list (page 156).

Export your accounts

WHERE TO FIND IT  **Customers** ›  **Accounts** › **Export CSV**

Store owner, Manager

Press **Export CSV** at the top of the Accounts list to download your accounts as a spreadsheet file named `accounts-` and the date. It opens in Excel, Numbers or Google Sheets. The file always holds every active account, whatever you have typed in the search box. Archived accounts are not in it.

The columns are Number, Name, Type, Status, Email, Phone, Address, City, State, Postal, Tax exempt and Tags, followed by a column for each farm profile field when the Feed & Seed pack is on. The address is the billing address. Contacts are not in this file. Each export is recorded, so treat the file like your customer list: it has your customers' phone numbers and email addresses.

Accounts that come from online orders

Two different things are called a customer account. A shopper can make a sign-in on your website, which shows their past orders and fills in the checkout form for them. That sign-in belongs to the shopper. Roadside has no screen that lists website sign-ins.

The account in Roadside is your record of the customer. When someone places an online order, Roadside looks for an account here with the same email address, on the account or on one of its contacts. If it finds one, the order is added to it. If not, Roadside makes a Customer account, named for the company if the shopper gave one and for the person if not, with the person as primary contact and the tag *online customer*. It adds a timeline line for the order, and the order links to the account.

If the shopper ticked the box to get news by email at checkout, the account also gets the tag *email sign-up*. That tag does not put anyone on the email list. Chapter 21, The email list (page 156) explains how people get on the list.

A customer who orders by phone has no account until you make one, so add them the way the earlier section shows. Orders themselves are in Chapter 18, Working the orders (page 128).

WHAT YOU CAN DO	STORE OWNER	MANAGER	STAFF	READ ONLY
Look at accounts, contacts and timelines	Yes	Yes	Yes	Yes
Add or change accounts, contacts and notes	Yes	Yes	Yes	No
Export accounts	Yes	Yes	No	No
Archive and restore accounts	Yes	Yes	No	No

21 The email list

The email list is your record of the people who said you may email them, with proof of when and how they said it. This chapter covers who is on it, how to add people, and how to use the list with the email service you already have.

IN THIS CHAPTER

- What the list does, and what it does not
- How people get on the list
- The list screen and one person's page
- Adding one person, and importing a file
- Confirming sign-ups by email
- Unsubscribes, and who you cannot add back
- The sign-up page and the form for your website
- Exporting the list to send a newsletter

What the list does, and what it does not

WHERE TO FIND IT  **Customers** ›  **Email list**

Store owner, Manager

Roadside keeps the list and the proof behind each name. It does not send newsletters. When you want to send one, you export the list and send it from an email service of your own, such as Mailchimp or whatever you use today. Only the Store owner and the Manager see the Email list, and both can do everything in this chapter. Staff and Read only roles do not see it.

The only message Roadside sends to anyone on the list is the one-time email that asks a new sign-up to confirm. Order receipts and pickup notices are separate and keep going out whatever a person's status is.

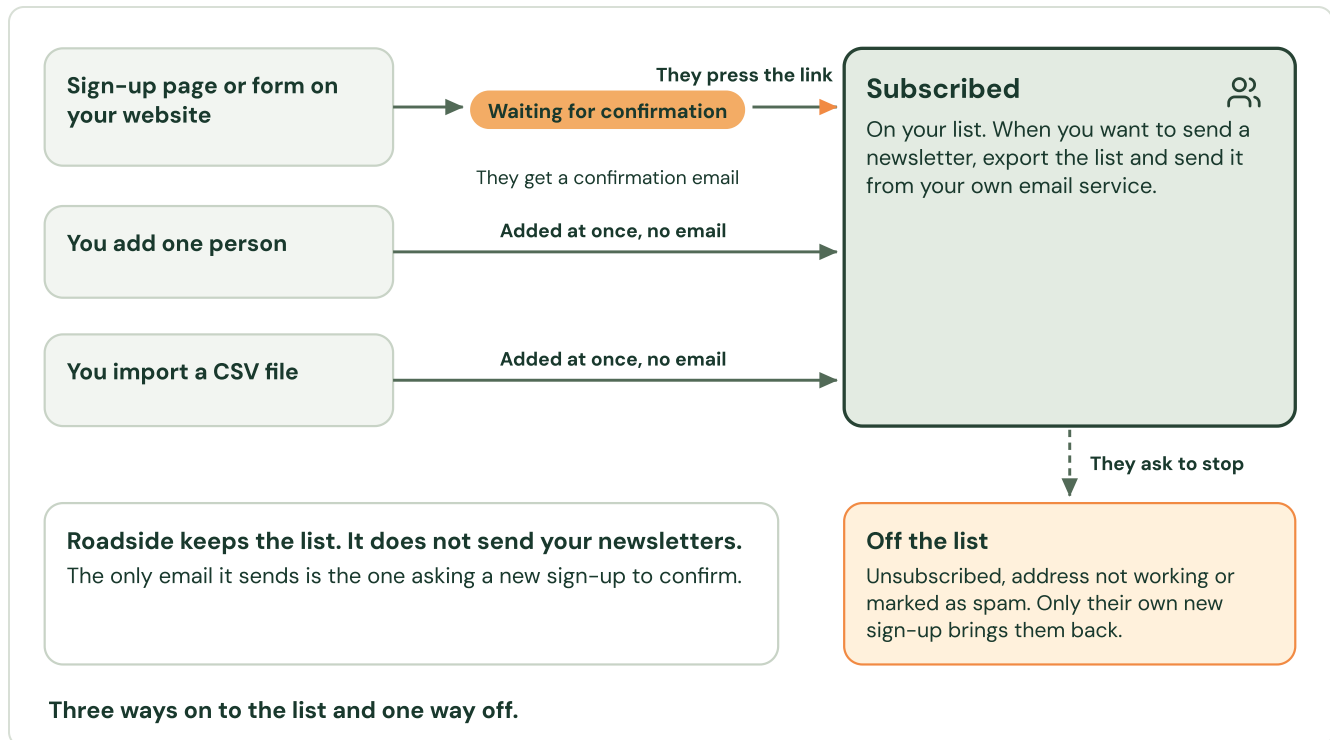
CAREFUL

The *Email me news and specials* box at checkout does not add anyone to this list. When a shopper ticks it, Roadside saves the answer on the order, which shows a green **Asked for news by email** badge, and tags their customer account *email sign-up*. To get that person on the list, use the sign-up page, the form on your website, **Add person** or an import.

How people get on the list

Each person arrives in one of five ways. The **From** column on the list says which.

- *Sign-up form*: the sign-up page Roadside hosts for you.
- *Form on your website*: a sign-up box on your own website.
- *Added by staff*: someone on your team used Add person after the customer asked.
- *CSV import*: they came in with a file.
- *Link in an email*: they had left the list and joined again from a link.



WORDS TO KNOW

Consent record

What Roadside keeps for each person: the date they agreed, the exact words they agreed to, where it came from, and, if they left, when. It is your proof that they asked for your emails.

Double opt-in

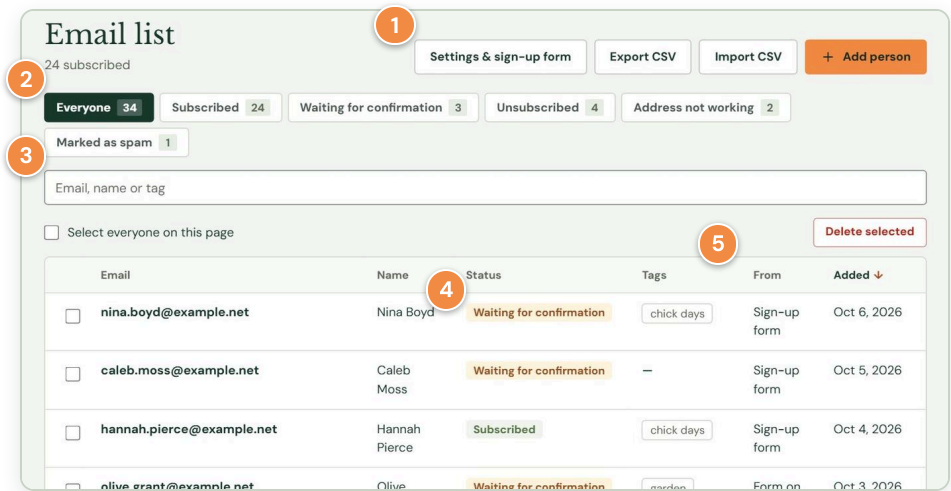
A sign-up that only counts after the person clicks a link in an email you send them. It keeps out mistyped addresses and addresses someone signed up for another person. The settings screen calls it *Send a confirmation email first*.

CSV file

A plain spreadsheet file with a row for each person. Excel, Numbers and Google Sheets can save and open it.

The list screen

The top of the screen says how many people are subscribed. Below it, the buttons along the top right are **Settings & sign-up form**, **Export CSV**, **Import CSV** and **Add person**.



- 1 Settings, export, import, and adding one person.

2 Show one status at a time. A status with nobody in it has no button.
- 3 Search by email, name or tag. The list narrows as you type.

4 Where the person stands. Press the email to open their page.

5 How they got on the list.

Customers > Email list.

STATUS	WHAT IT MEANS
Subscribed	They agreed, and you may email them.
Waiting for confirmation	They signed up, and Roadside has asked them to confirm. They are not on your list yet.
Unsubscribed	They asked to stop. You cannot add them back.
Address not working	Email to this address came back, so it is not used again.
Marked as spam	They reported one of your emails as spam, so they are not emailed again.

The list is 50 to a page, newest first. Press **Email**, **Name**, **Status** or **Added** to sort by it. The small tags under the Tags heading are yours: *horses*, *chick days*, whatever helps you pick a group later.

To delete people, tick them (or tick **Select everyone on this page**) and press **Delete selected**, up to 500 at once. Delete is for a mistake, such as a file you should not have imported. It removes the person and their consent record. For someone who asked to stop getting email, use Unsubscribe, which keeps the record.

One person's page

WHERE TO FIND IT  **Customers** ›  **Email list** › **a person**

Store owner, Manager

Press an email address to see everything about that person. If the person's email matches an account in Roadside, the **Customer account** line links to it, so you can see what they buy. Tags are separated by commas, up to 300 characters in all.

← Email list

Hannah Pierce

Subscribed

UnsubscribeDelete

Details

Email

hannah.pierce@example.net

Customer account

—

Joined from

Sign-up form

Agreed to email

Oct 4, 2026 9:20 PM

What they agreed to

"Email me news and specials. I can unsubscribe at any time."

Consent history

Kept as proof of when and how this person agreed, and when they left.

Confirmed by email

Link in an email · Oct 4, 2026 9:20 PM

Signed up, confirmation email sent

Sign-up form · Oct 4, 2026 9:16 PM

"Email me news and specials. I can unsubscribe at any time."

Email, name and tags

Email

- 1

Unsubscribe or Delete. A person waiting for confirmation also has Send confirmation again.
- 2

Where they came from and the exact words they agreed to.
- 3

Fix a typo in the email address, or change their name and tags. Their consent history stays with them.
- 4

Each step, newest first: the date, where it happened, and who did it when a person on your team was involved.

One person on the list.

Add one person

WHERE TO FIND IT

 Customers >  Email list > Add person

Store owner, Manager

Use this when someone tells you at the counter or on the phone that they want your emails. They are added at once, with no confirmation email, because you are vouching that they asked.



- 1 **Press Add person.**
- 2 **Type their email address.** A name and tags are optional.
- 3 **Write how they asked** in **How they asked**, for example *at the counter, Oct 2*. It is saved with their consent record.
- 4 **Tick the box** that says *This person asked to get news and specials by email from us*. Roadside will not add them without it.
- 5 **Press Add to email list.** Their page opens and says the address is on your email list.

- 1 The address. Check the spelling before you save.
- 2 Where and when they asked.
- 3 You confirm that they asked.
- 4 Adds them as Subscribed.

Adding a person who asked at the counter.

If the address is already on the list, Roadside tells you rather than adding it twice. If the person left the list earlier, Roadside refuses, and the section on unsubscribes explains why.

Import a list from a spreadsheet or another service

WHERE TO FIND IT **Customers** › **Email list** › **Import CSV**

Store owner, Manager

If you already have a list in a spreadsheet, in Mailchimp or in an older system, bring it over with a CSV file. Only import people who said yes to getting email from your business. A list of everyone who ever bought from you, or a list you bought, does not count, and the import screen says so.

- 1 **Get the file ready.** The first row must be headings, and one of them must be **Email** (also accepted: Email address, E-mail, Customer email). Roadside uses **Name**, or **First name** and **Last name**, and **Tags** when they are there. Delete anyone who unsubscribed in your old system. From Excel, save as *CSV UTF-8*. The file can have up to 25,000 rows and be 5 MB.
- 2 **Press Import CSV** and choose the file.
- 3 **Add tags to everyone in the file** if you like, for example *imported, 2026 customers*.
- 4 **Tick the box** that says everyone in the file agreed to get email from your business and that anyone who asked to stop has been taken out.
- 5 **Press Import.**

The screenshot shows the 'Import a list' interface. It includes a header 'EMAIL LIST' and a sub-header 'Import a list'. Below this is a section 'Upload a CSV file' with a 'Choose File' button and a 'No file chosen' message. A text box below the button contains instructions: 'The first row must be headings. We look for Email, and use Name (or First name and Last name) and Tags when they're there. Up to 25,000 rows and 5 MB.' To the right is a 'Before you import' warning box with four bullet points. Below the instructions is a text box for tags with the example 'imported, 2026 customers'. Below that is a checkbox labeled 'Everyone in this file agreed to get email from this business, and anyone who asked to stop has been taken out.' At the bottom is an 'Import' button. Numbered callouts 1 through 5 point to these elements: 1 points to the 'Choose File' button, 2 points to the tag text box, 3 points to the checkbox, 4 points to the 'Import' button, and 5 points to the 'Before you import' warning box.

- 1 Choose your CSV file.
- 2 Optional. Added to everyone in the file.
- 3 You must tick this to import.
- 4 Starts the import at once.
- 5 Read this before you import.

The import screen.

Everyone in the file is subscribed straight away, with no confirmation email, and each person's record says *Imported from* the file name, *by* your name. When the import finishes, a box reports the counts. It says how many people were added and how many were already on the list, with and without changes. It says how many were skipped because they had unsubscribed, bounced or reported spam, and how many lines were not email addresses or were listed twice. It shows the first 20 problem lines, such as *Line 7: "bob@" is not an email address*. Press **See the email list** to go back.

⚠ CAREFUL

An import has no preview and no undo. If you imported the wrong file, tick those people on the list and use **Delete selected**. Old lists also go stale: many addresses that worked two years ago bounce now, and a lot of bounces can get your sending stopped by your email service.

Confirm sign-ups by email

WHERE TO FIND IT



Customers

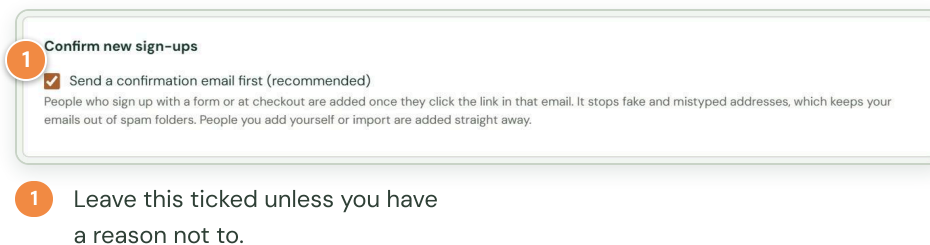


Email list

Settings & sign-up form

Store owner, Manager

With **Send a confirmation email first (recommended)** ticked, which is how Roadside starts out, a person who signs up on a form is not added until they click the link in an email Roadside sends to that address. It stops fake and mistyped addresses, which keeps your emails out of spam folders. People you add yourself and people you import are added straight away, as above.



The confirmation setting.

The new sign-up sees *Check your email* and the status **Waiting for confirmation** appears on your list. The email's subject reads *Please confirm*, then your store's name and *email list*, and it holds one link. The link opens a page with a button, **Yes, sign me up**, and pressing it puts the person on the list. It is a button on purpose, so that programs that scan email links cannot confirm for someone.

If a person says the email never came, open their page and press **Send confirmation again**. Roadside sends at most one every 10 minutes to the same address. If it says one went out in the last 10 minutes, wait and try again. If it says email is not set up, write to support@dirtyroadsoftware.com. Sign-ups nobody confirms are removed after 30 days.

Unsubscribes, and who you cannot add back

The sign-up pages tell people that every email has an unsubscribe link. Roadside does not send your newsletters, so that link comes from your email service. Pick one that puts it in every email, which most do. Inside Roadside, a person goes to Unsubscribed when you press **Unsubscribe** on their page, or

when they press the **Unsubscribe** link on the page their confirmation email opens. The page says *You're unsubscribed* and adds that order receipts and pickup notices still arrive as usual, with a link for anyone who pressed it by mistake.

A person whose status is Unsubscribed, Address not working or Marked as spam **cannot be added back by you or by an import**. Only their own new sign-up does that, by the sign-up page, your website's form, or the link in an email. If you try to add one, Roadside names the date they left and says why you cannot.

To take someone off the list yourself, open their page and press **Unsubscribe**, not Delete. Unsubscribe keeps the record that they left, so a later import cannot put them back by accident. Delete erases it, and the person can then be added again.

GOOD TO KNOW

When someone unsubscribes from a newsletter you sent through another email service, Roadside does not hear about it. Open that person's page here and press **Unsubscribe**, so your next export does not carry them forward.

The sign-up page and the form for your website

WHERE TO FIND IT



Customers



Email list

Settings & sign-up form

Store owner, Manager

Roadside can host a sign-up page for you and give you a form to paste into your website. Both are off until you tick **Accept sign-ups from a form**. While it is off, the sign-up page does not exist.

- 1 **Tick Accept sign-ups from a form.**
- 2 **Write the heading and a sentence or two** about what you send, for example how often.
- 3 **Check What people agree to.** The wording starts as *Email me news and specials. I can unsubscribe at any time*. It shows under the form and is saved with every sign-up as proof of what they agreed to.
- 4 **Press Save settings.** The link and the form appear.

1

Sign-up form

2

Accept sign-ups from a form

2

Heading

Baker Feed news and specials

A sentence or two about what you send

Chick Days dates, new arrivals and in-store specials, about twice a month.

3

What people agree to

Email me news and specials. I can unsubscribe at any time.

Shown under the form and saved with each sign-up as proof of what they agreed to.

4

Link to your sign-up page

https://roadside.dirtroadsoftware.com/email/join/baker-feed

Share it on social media, in receipts or on a sign by the register. [Open it](#)

5

Form for your own website

```
<form action="https://roadside.dirtroadsoftware.com/api/v1/email/join/baker-feed"
method="post">
  <label>Email <input type="email" name="email" required></label>
  <label>Name <input type="text" name="name"></label>
  <input type="text" name="website" tabindex="-1" autocomplete="off"
style="display:none">
  <button type="submit">Sign up</button>
  <p>Email me news and specials. I can unsubscribe at any time.</p>
</form>
```

Paste this into your website, or send it to whoever looks after it. Sign-ups land on this list and visitors see your confirmation page.

- 1

Turns the sign-up page and the form on.
- 2

The heading people see.
- 3

The words they agree to.
- 4

The address of your sign-up page. Share it on social media, on receipts or on a sign by the register.
- 5

The form for your own website. Copy it as it is.

The sign-up form settings, with the form on.

The sign-up page is a plain page with your heading, a box for an email, a box for a name that is optional, a **Sign up** button and your agreement wording underneath. Someone who joins sees *Check your email* when confirmation is on, or *You're on the list* when it is off.

Baker Feed & Country Store

1

Baker Feed news and specials

Chick Days dates, new arrivals and in-store specials, about twice a month.

2

Email

Name (optional)

3

Sign up

Email me news and specials. I can unsubscribe at any time.

- 1

Your heading.
- 2

The only required box.
- 3

Sign up.

What a visitor sees on your sign-up page.

Send the form code to whoever looks after your website, or ask support@dirtroadsoftware.com. Sign-ups from it land on this list, marked *Form on your website*, and the visitor sees a confirmation page. The form has one box the visitor never sees. Roadside uses it to turn away robots, so leave it alone.

NEWS FROM THE FEED ROOM

What's in, what's on sale, and when the chicks come. A note or two a month, no more.

you@yourfarm.com

Join the list →

- 1 What the store tells visitors about the list.
- 2 Where a visitor types an address.
- 3 Sends it to Roadside, which adds it to your list.

The email box in the footer of the sample store's website.

On a website like the sample store's, whose footer already has an email box, the box starts sending sign-ups to Roadside a few minutes after you turn the form on. Before that, it opens the visitor's own email program.

Export the list to send a newsletter

WHERE TO FIND IT **Customers** > **Email list** > **Export CSV**

Store owner, Manager

Press **Export CSV** and Roadside downloads a file named `email-list-` and the date. It has a row for everyone on the list, whatever is on screen, with these columns: Email, Name, Status, Tags, Source, Agreed, Unsubscribed and Added.

- 1 **Open the file** in a spreadsheet and keep only the rows where **Status** says *subscribed*. The file also lists people who left or whose address stopped working, so delete those rows before you send anything.
- 2 **Keep the Tags column** if you want to send to a group, such as only the people tagged *chick days*. Most email services can read a tags or groups column when you upload.
- 3 **Upload the rows** to your email service the way it asks for a list of contacts, and send your newsletter from there.

Export again before each send. People join and leave between newsletters, and Roadside does not send the changes to your email service for you.

22 Articles

Articles are the news and tips on your website: Chick Days dates, what is in for fall, how to pick a horse feed. You write them in Roadside and they appear on your website a few minutes after you publish.

IN THIS CHAPTER

- The article list and Most read stories
- Writing and publishing an article
- Photos in an article
- Category, tags, author and summary
- Scheduling, taking down, and the trash
- Earlier versions and restore
- Categories, authors and Settings
- SEO articles, the add-on that writes them on a schedule

The article list

WHERE TO FIND IT  Website >  Articles

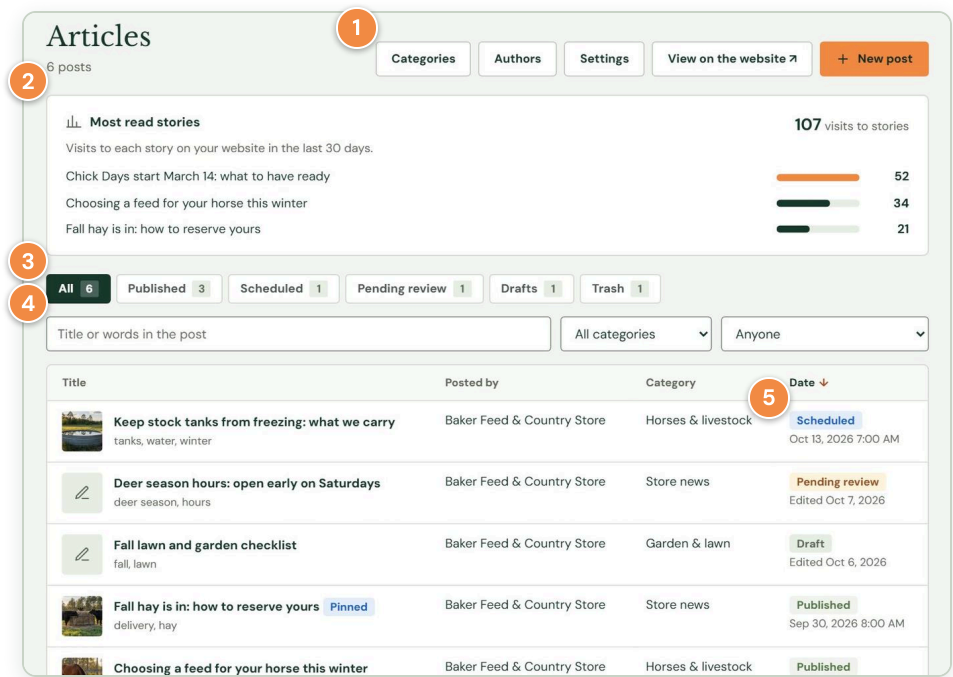
Store owner, Manager, Staff

Articles appears in the menu when it is turned on for your store. If you do not see it, write to **support@dirtroadsoftware.com**. The Store owner and the Manager can do everything in this chapter. Staff can write articles and send them for review. Only the Store owner and Manager can publish, and only they see Categories, Authors and Settings.

The list shows every article, published or not. The heading is the name you give the section in Settings, which starts as *Blog* until you change it.

STATUS	WHAT IT MEANS
Published	Live on your website.
Scheduled	Has a date still to come. It goes live by itself.
Pending review	A person who cannot publish has sent it for you to read and publish.
Draft	Saved, but only your team can see it.
Trash	Taken off the website. Roadside keeps it for 30 days and then deletes it for good.

Each row shows a thumbnail, the title, the tags, who posted it, the category and the date. A **Pinned** badge sits on an article you have pinned to the top of the website's Articles page. Press **Title** or **Date** to sort. The list shows 25 articles to a page.



- 1

Categories, Authors and Settings, a link to your Articles page on the website, and the New post button.
- 2

The articles people read most on your website in the last 30 days, with the number of visits to each.
- 3

Filter by status. The number is how many articles have it.
- 4

Search the title and the words in the post, or narrow by category and by who posted it.
- 5

A blue Scheduled badge with the date and time it goes live.

Website > Articles.

Most read stories appears above the list when the website has had visits to articles. Its numbers come from Analytics, so they match the Pages tab in Chapter 23, Analytics (page 180).

Write and publish an article

WHERE TO FIND IT

Website

Articles

New post

Store owner, Manager, Staff

- 1

Press **New post**. You can also use the **New** button at the top of any screen, or **Write a post** on Website home.

- 2 **Type the title.** It is required, up to 200 characters.
- 3 **Write in the Post box.** Use the toolbar above it for headings, lists and links.
- 4 **Add a photo, a category and a summary** if you like. The next sections show how.
- 5 **Press Publish.** Roadside says *Post published.* and the article is on your website a few minutes later.

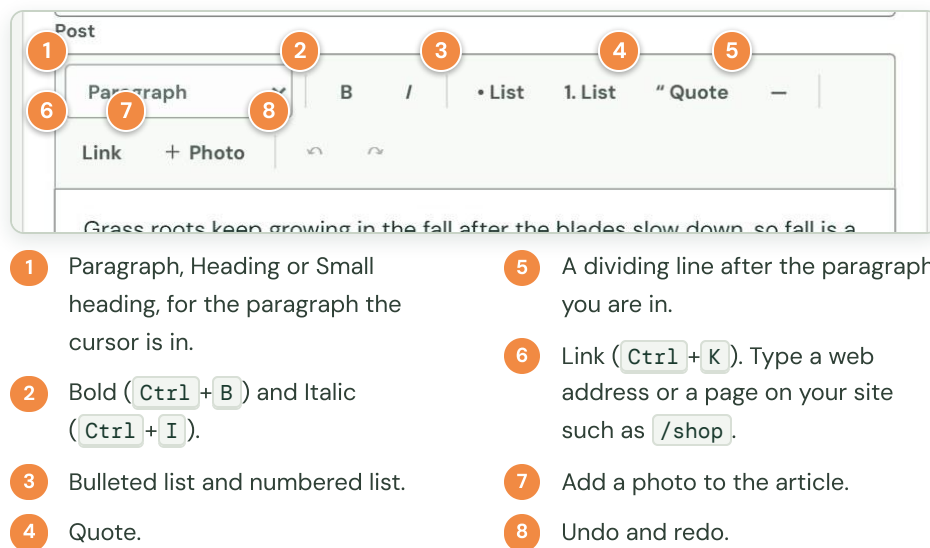
- 1 The title. It shows at the top of the article and in lists.
- 2 Formatting buttons.
- 3 The article itself.
- 4 Publish, Save draft or Preview, and the Publish later fold-out.
- 5 When the article was last saved.

Writing an article.

You do not have to press Save as you write. Roadside saves a draft by itself every 30 seconds while something has changed, and when you switch to another tab. A new article becomes a draft on its first save and shows as *Untitled post* until it has a title. Press **Save draft** when you want to stop and come back, or **Preview** to open the article's address on your website.

CAREFUL

Preview opens the address on your website, and the website shows only published articles. A draft's Preview can therefore say the page was not found until you publish. Read a draft in the editor instead.



The toolbar above the Post box.

The box keeps to a short list of things, so every article looks like the rest of your website: paragraphs, two sizes of heading, lists, quotes, photos with a caption, dividing lines, bold, italic and links. There are no colors, fonts, tables or videos. Text you paste from Word, Google Docs or another website is cleaned down to those things, and pictures on other websites are left out. **Enter** at the end of a heading starts an ordinary paragraph. **Shift** + **Enter** makes a line break.

An article can have up to 400 paragraphs, headings, lists and photos. A longer one gets *This post is too long. Split it into two posts.*

Photos in an article

WHERE TO FIND IT [Website](#) > [Articles](#) > [an article](#)

Store owner, Manager, Staff

An article can show two kinds of photo. The **featured photo** goes at the top of the article, in lists and when someone shares it. Photos **in the text** go where you put them.

A photo in the text

- 1 **Click in the Post box** after the paragraph where the photo belongs.
- 2 **Press + Photo** in the toolbar. On the Upload tab, choose a picture from your computer or your phone's camera. It appears as a preview when it has uploaded.
- 3 **Describe the photo** in one short sentence, or tick **It's only decoration, so it needs no description.**

4 **Add a caption** if you want one. It shows under the photo.

5 **Press Add to the post.**

The screenshot shows the 'Add a photo' dialog box. It has two tabs: 'Upload' (selected) and 'Photos in this post'. Under the 'Upload' tab, there is a 'Photo' section with a 'Choose File' button and the text 'No file chosen'. Below this is a note: 'JPEG, PNG or WebP, or straight from your phone's camera. Big photos are made smaller before they're sent.' Then there is a 'Describe the photo' section with a text input field containing 'e.g. Rows of seedlings in a greenhouse'. Below that is a checkbox labeled 'Read aloud to people who can't see it.' with the text 'It's only decoration, so it needs no description' next to it. Then there is a 'Caption' section with a text input field containing 'Optional. Shown under the photo'. At the bottom are two buttons: 'Add to the post' (orange) and 'Cancel' (white).

- 1 Upload a new photo, or pick one already used in this article.
- 2 What the photo shows. Up to 200 characters.
- 3 For a picture that adds nothing a person would miss.
- 4 Optional. Up to 300 characters.
- 5 Puts the photo into the article.

The Add a photo box.

WORDS TO KNOW

Photo description

A sentence saying what the photo shows. People who use a screen reader hear it, and it shows when a photo does not load. Search engines read it too.

Roadside takes JPEG, PNG and WebP photos. Your browser shrinks a big photo before it uploads it, and Roadside removes hidden camera information such as the place where it was taken. A photo over 6 MB gets *That photo is larger than 6 MB*. A photo that cannot be read gets a message that tells you to save it again as a JPEG or PNG and try once more. Dragging a picture file onto the Post box opens the same box.

The featured photo

Use the **Photo** card in the right-hand column. Press **Choose File** and pick a picture. Wide photos work best. Type a **Photo description**, which becomes required once you choose a photo. The link under the file box, **use a photo from this post**, reuses a photo already in the text. Tick **Remove this photo** to take it off.

CAREFUL

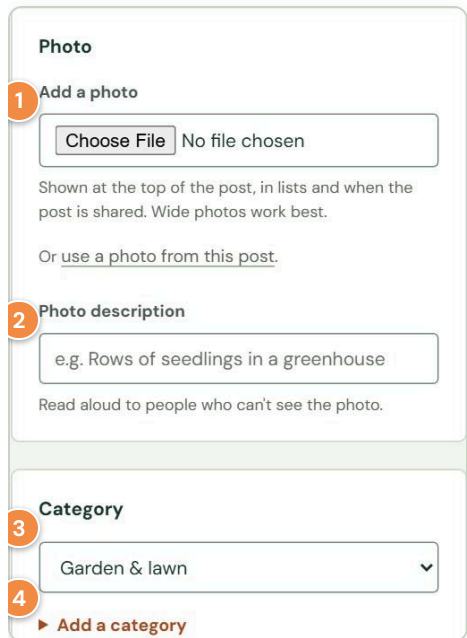
The featured photo is sent when you press Publish, Update or Save draft. The automatic save does not send it, so press a save button after you choose one.

Category, tags, author and summary

WHERE TO FIND IT  Website >  Articles > an article

Store owner, Manager, Staff

The right-hand column holds the details that go with the words. Together they decide how the article is listed, found and shared.



Photo

1 Add a photo

Choose File No file chosen

Shown at the top of the post, in lists and when the post is shared. Wide photos work best.

Or use a [photo from this post](#).

2 Photo description

e.g. Rows of seedlings in a greenhouse

Read aloud to people who can't see the photo.

3 Category

Garden & lawn

4 Add a category

- 1 The featured photo.
- 2 Required once there is a photo.
- 3 One category for each article.
- 4 Make a new category right here.

The Photo and Category cards.

WORDS TO KNOW

Category

One of the few big topics your articles cover, such as Poultry or Horses & livestock. Each article has one.

Tag

A detail about the article, such as *chick days* or *winter*. An article can have several. Roadside adds new tags for you as you type them.

Tags goes just above **Posted by**, which lists the names you set up on the Authors screen. Each article shows the store's name unless you pick another, so no employee's sign-in name reaches the website by itself. **Summary** is a sentence or two for lists. Leave it blank and Roadside uses the start of the article.

The **Search engines and sharing** box is closed until you open it. **Web address** is the last part of the article's address. Leave it blank and Roadside makes it from the title, with lowercase letters, numbers and dashes. On a published article, changing it keeps the old address working. **Search engine title** and

Search engine description are what Google and Bing show for the article. Blank, they use the title and the summary.

Schedule an article, take it down, or trash it

WHERE TO FIND IT [Website](#) > [Articles](#) > [an article](#)

Store owner, Manager

Fold out **Publish later** in the Publish card and choose a **Date** and **Time**. The time is your store's own, shown under the boxes. The Publish button now says **Schedule**. Press it and Roadside says *Post scheduled. It goes live* and the date. The article goes live by itself within about a minute of that time, and reaches the website a few minutes after that.

The screenshot shows the 'Publish' card for a draft article saved on Oct 6, 2026 at 12:43 AM. It features three buttons: 'Schedule' (highlighted with callout 1), 'Save draft', and 'Preview'. Below these is a collapsed 'Publish later' section (callout 4). Expanding it reveals a 'Date' field (callout 2) with '10/20/2026' and a 'Time' field (callout 3) with '07:00 AM'. A note explains that a future date schedules the post for automatic live publication. At the bottom, there is a 'Pin to the top' checkbox and a 'Move to the trash' link. Callout 5 points to the overall 'Publish' card header.

- 1 Fold this open to set a date.
- 2 The day it should go live.
- 3 The time, in your store's time zone.
- 4 The button now says Schedule.
- 5 The article's state.

Choosing a date turns Publish into Schedule.

A date in the past backdates the article: it goes live now and shows that earlier date. Leave the date blank to publish right away. On a published article the button reads **Update**, and **Change the date** replaces Publish later.

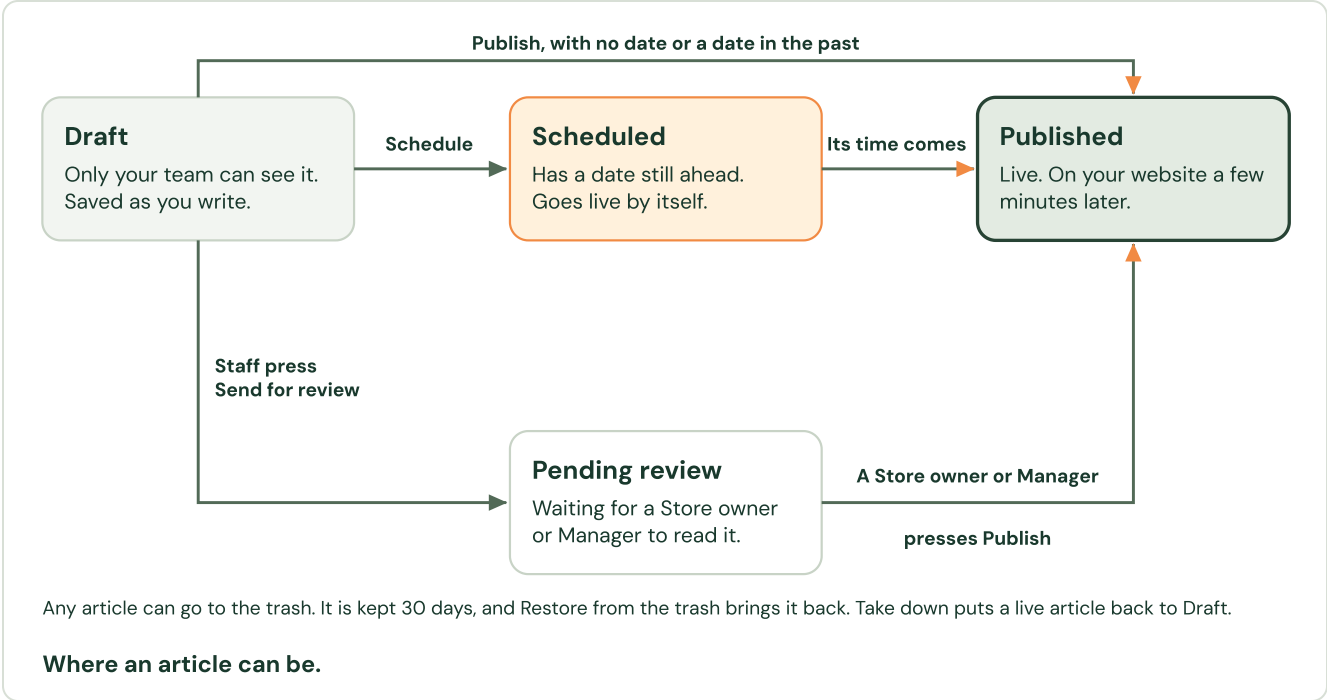
CAREFUL

If you change a live article's date to one still ahead and press Update, the article comes off your website until that date. The message *Post scheduled. It goes live* is the only warning.

The same card has the other controls. **Pin to the top** keeps an article first on your Articles page, whatever its date. **Take down (back to draft)** removes a published article from the website and keeps it as a draft only your team can see. **Move to the trash** takes it off the website as well, and keeps it 30 days. Open a trashed article and press **Restore from the trash** to bring it back. **Delete for good**, on a trashed article, cannot be undone.

Review before publishing

A person with the Staff role sees **Send for review** and **Save draft** instead of Publish. The article waits under **Pending review** until a Store owner or Manager reads it and publishes it. Staff can change only their own articles that are not published yet.



If two people open the same article and one saves first, the other sees *Someone else saved this post while you were editing it*. Copy your changes, reload the page and make them again. A live article is never changed by the automatic save. Your unsaved words are kept aside and offered back with **Bring them back** the next time you open it, and you press **Update** to put them live.

Earlier versions and restore

WHERE TO FIND IT

[Website](#) › [Articles](#) › [an article](#) › [earlier versions](#)

Store owner, Manager, Staff

Each time the title, summary or words of an article change, Roadside keeps the version it replaced. The last 25 are kept. Open the article and press the button in the top right that says how many earlier versions there are.

← Choosing a feed for your horse this winter

Earlier versions

Each time the words of a post change, the version they replaced is kept here (the last 25). Restoring one puts its title, summary and post back; the current words are kept as a version too.

1

Sep 29, 2026 12:19 AM

Dana Whitfield · 134 words

Show this version

2

Restore this version

3

Sep 24, 2026 12:19 AM

Dana Whitfield · 115 words

Show this version

Restore this version

Sep 16, 2026 12:19 AM

Dana Whitfield · 64 words

Restore this version

1

One card for each saved version, with its date, who saved it and how many words it had.

2

Brings that version's title, summary and words back.

3

Opens the old words so you can read them first.

Earlier versions of an article.

- 1

Press **Show this version** on a card to read it.
- 2

Press **Restore this version** on the one you want, and confirm. The current words are kept as a version too, so nothing is lost.
- 3

You are back in the editor with those words.

⚠ CAREFUL

Restoring an earlier version on a live article changes the live article at once. Restore brings back the title, summary and words only. The category, tags, date, photo and web address stay as they are.

Categories and tags

WHERE TO FIND IT

Website

Articles

Categories

Store owner, Manager

Press **Categories** at the top of the article list. The left card lists your categories with their order and how many articles each has. The right card adds a new one. Under them, a Tags table lists every tag with its article count and a **Rename or delete** link.

A category's **Order** is a number from 0 to 9999. Lower numbers come first. Its **Description**, up to 1,000 characters, shows at the top of the category's page. Deleting a category leaves its articles in place without a category. Deleting a tag takes it off its articles. Each category gets its own page on your

website.

← Articles

Categories & tags

Categories are the few big topics your blog covers; each post has one. Tags are the details, and a post can have several. Both get their own page on the blog.

1

Category	Order	Posts
Poultry https://www.bakerfeedandcountrystore.com/articles/category/poultry	10	1
Horses & livestock https://www.bakerfeedandcountrystore.com/articles/category/horses-livestock	20	2
Store news https://www.bakerfeedandcountrystore.com/articles/category/store-news	30	2
Garden & lawn	40	1

2

3

Add a category

Name

e.g. Tips & how-to

Description

Optional

Add category

1

Each category with its order number, article count and its address on your website.

2

Name and an optional description.

3

Change a category's name, order or description, or delete it.

Categories and tags.

Authors

WHERE TO FIND IT

Website

Articles

Authors

Store owner, Manager

Authors are the names an article can be *Posted by*. Roadside makes one from your business name and uses it unless an article names someone else. You might add the family name, or the person who writes the Chick Days posts. The left card lists each name with how many articles show it, and a **Default** badge on the one used when an article picks none. **Make the default** moves the badge, **Change** opens a name to edit, and the trash icon removes it. The default cannot be removed until another name is the default. The right card, **Add a name**, takes the name posts show, an optional photo (a face or the storefront, square works best, JPEG, PNG or WebP up to 6 MB) and an optional line about them. A removed name leaves its articles showing the default.

Settings

WHERE TO FIND IT

Website

Articles

Settings

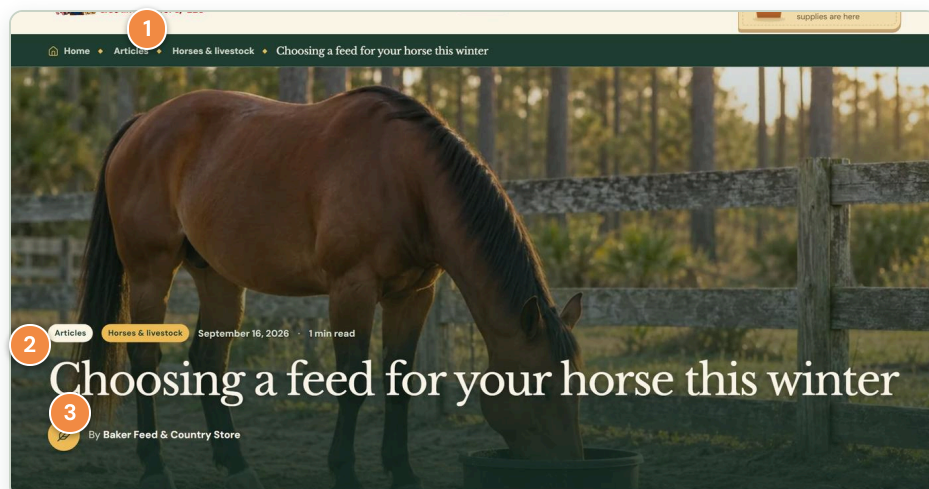
Store owner, Manager

Your website's design decides how articles look. Settings holds the choices it leaves to you.

The Settings screen has two cards. **The section** holds the **Name** of the page that lists your articles (and its name in menus, breadcrumbs and the feed), an **Introduction** of a line or two under it, and the **Description for search results**. **Each post shows** holds three ticks, **Who posted it**, **The date it was posted** and **How long it takes to read**, plus how many **More posts under each post** to offer (None, 3 or 6). Press **Save** and the website shows the change within a few minutes. Leave **Name** blank and the page is headed *Blog*. **Description for search results** is about 150 characters, and if you leave it blank Roadside uses the introduction. **Posts in the RSS feed** sets how many recent articles go into your articles feed, a file that readers and apps use to follow a site. The address of your Articles page, `/articles`, has no setting.

How soon an article reaches the website

Publishing, updating, taking down, trashing or restoring a live article, pinning, and changing categories, tags, authors or Settings all tell the website to update. About a minute later Roadside rebuilds the pages the change touches and sends them to the website. A burst of edits makes one update. Expect the change on your website a few minutes after you press the button, and see Chapter 8, How your changes reach the website (page 49) for how updates reach it.



- 1 The category, which has a page of its own. The date and reading time sit beside it.
- 2 The title.
- 3 The Posted by name.

An article on the sample store's website.

SEO articles

WHERE TO FIND IT  Website > SEO articles

Store owner, Manager

This appears when your plan includes the SEO Articles add-on. On a schedule set by the add-on, Roadside picks something people near you search for, writes an article about it from your own products, prices and hours, adds a photo, and publishes it on your website. The plan is one article a month, one a week, or two a week. Articles come out in the first hour after 7:00 a.m. store time, on the first weekday of the month, on Tuesdays, or on Tuesdays and Fridays. The screen shows the exact day and time of the next one.

CAREFUL

SEO articles publish without asking you first. When one goes out, Roadside emails the store's owners at once with a link to the article, so you can change it. The only brake before an article is written is the **Pause SEO articles** tick. After it is written, you edit, take down or trash it in Articles like any other.

Under the plan, **Topics waiting** lists search phrases. The first carries a **Next** badge. Press **Write it next** on another to move it up, or **Set aside** to drop one. **Recent articles** lists what happened at each scheduled time, with a status: Published, Skipped, Didn't work, Writing, or Saved as a draft.

The **What the articles cover** card is yours to fill in. **Towns you serve** lists the only towns an article may mention. **Delivery, in a sentence** is how you say it, for example the radius you deliver. **Topics to avoid** takes one subject per line. **Google Search Console property** is optional. Search Console is a free Google tool that shows what people searched to reach your site. With it connected, topics include searches your website already shows up for. Tick **Pause SEO articles** to stop all writing until you untick it, then press **Save**.

An article never goes out without its photo. If the photo does not come, the article is saved as a draft with a note, as in the picture, and the owners get an email saying it needs a photo. Add one in Articles and publish it. Articles reach your website a few minutes after they go live, as described above. Anything in an article that you want changed, such as the voice it is written in, is something to ask Dirt Road for at support@dirtroadsoftware.com.

SEO articles

An article for your website on a schedule: a search phrase people near you look for, answered with what you sell and know.

Your plan

Next article: Tuesday, Oct 13 at 7:49 AM.

Topics waiting

Search phrase	Why it was picked	
best feed for horses in winter baker fill	People near you search this, and your store sells horse feed.	Set aside
how much to feed goats in fall	It came up in questions from your contact page.	Write it next Set aside
stock tank heater for winter	You carry tank heaters, and the season is starting.	Write it next Set aside

What the articles cover

Articles are written in your website's voice, the same one Fetch with AI uses. Dirt Road keeps it for you; ask to change it.

Towns you serve

Baker, Holt, Crestview, Laurel Hill

Articles mention these, never other towns.

Delivery, in a sentence

We deliver within 10 miles of the store.

Topics to avoid

medicated feed
prescription products

Google Search Console property

sc-domain:example.com

Optional. With it, topics come from searches your website already shows up for.

☐ Pause SEO articles

Save

Recent articles

- 1 Your plan, and when the next article is due.

2 Search phrases waiting to be written about, with why each was picked.

3 The first topic is written next.

4 What you tell Roadside about the store.

5 Tick to stop all writing until you untick it.

Website > SEO articles.

Recent articles		
When	Article	Status
Oct 2, 2026	When to put out a fall food plot near Holt	Published published to the website
Sep 25, 2026	How to choose a chick starter feed in Baker	Published published to the website
Sep 18, 2026	Keeping layers laying through the short days	Published published to the website
Sep 11, 2026	The photo didn't come, so the article is saved as a draft and not published. Add a photo in Articles and publish it.	Saved as a draft
Sep 4, 2026	There are no topics waiting. The next run asks for more.	Skipped

- 1 An article that was written. Press the title to open it in Articles.

2 Published, with a note that it reached the website.

3 The article was written but not published.

4 Why. Here the photo did not come, so the article waits as a draft.

Recent articles.

23 Analytics

Analytics counts the people who visit your website: how many, how they found it, what they looked at, and what they did. It is Roadside's own count, kept inside Roadside.

IN THIS CHAPTER

- What counts as a visit, a visitor and a page view
- The live view, and choosing the days
- The numbers on the Overview
- How people found you
- Engagement, and the Pages tab
- Calls, forms and orders
- How fast your pages load
- Setup, privacy, and reading small numbers

What Analytics counts

WHERE TO FIND IT  Website >  Analytics

Store owner, Manager

A small piece of code on your website, called the tracker, reports each page someone opens. Roadside adds it to your pages for you, so nothing needs pasting. Roadside then joins those reports into visits and sorts them into the tabs along the top: Overview, Acquisition, Engagement, Pages, Conversions, Performance and Setup. Staff and Read only roles do not see Analytics. The Store owner and the Manager can both change Setup.

WORDS TO KNOW

Page view

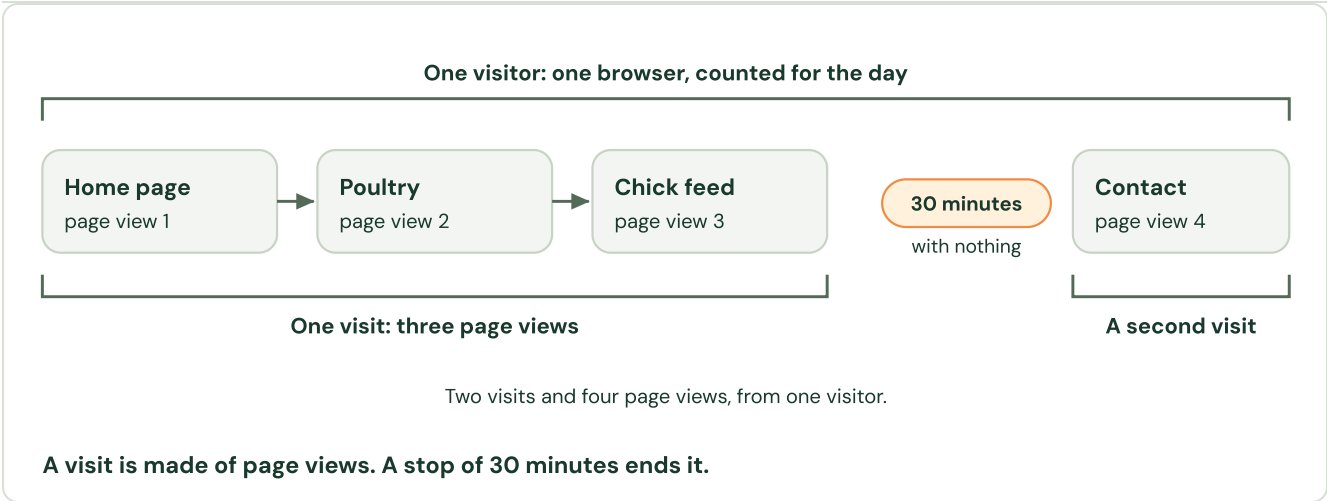
One page shown on someone's screen. Going to another page is another page view, and so is flipping to page 2 of a shop list.

Visit

One person's time on your website, from the first page they open until they stop for 30 minutes. If one person opens six pages in a row, that is one visit with six page views. If they come back after half an hour, it is a second visit.

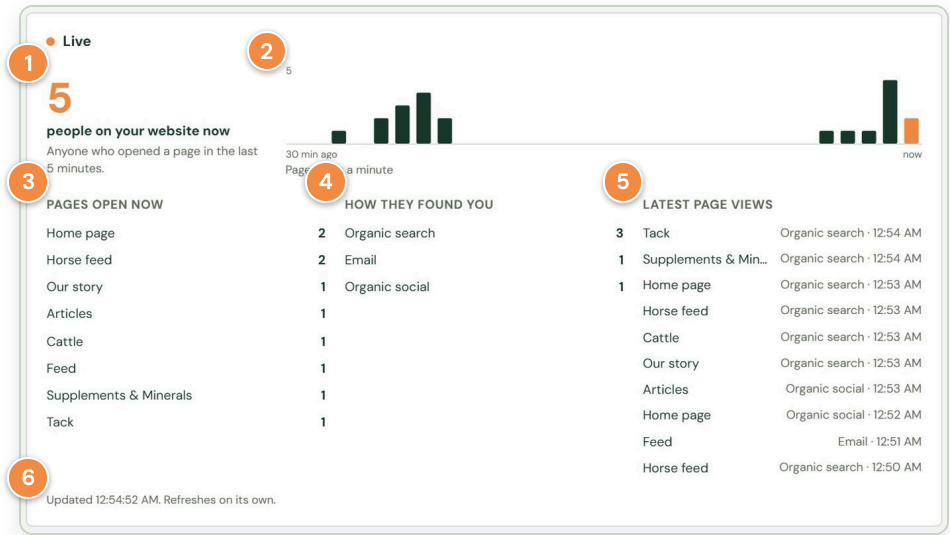
Visitor

One browser on one day. Someone who visits on three different days counts as three visitors, because Roadside does not follow people from day to day.



The live view and the days

The Overview opens with **Live**, a count of the people on your website now. It refreshes by itself every 15 seconds while the tab is on your screen.



- 1 Anyone who opened a page in the last 5 minutes.

2 Page views a minute, for the last 30 minutes. The last bar is this minute.
- 3 The pages those people have open.

4 How they found you, by channel.

5 The last ten page views, with the channel and the time.

6 When it last updated.

The Live card on the Overview.

Under the tabs, press **Today**, **Last 7 days**, **Last 30 days** or **Last 90 days** to choose the days. The screen opens on the last 7. Every tab but Setup follows your choice. The grey line beside the buttons names the dates and the days they are compared with. Days follow your store's time zone, so "Today" ends at your midnight.

The numbers on the Overview

Six tiles sum up the days you chose. Each shows how the number changed against the same number of days just before. A green arrow means it moved in the good direction and a red one means it did not. You may also see *Same as before*, or *New* when there was nothing earlier to compare with. Rates show their change in **pts**, short for percentage points. If the engagement rate goes from 78% to 81%, it is up 3 pts.

WORDS TO KNOW

Engaged visit

A visit that lasted 10 seconds or more with a page showing on the screen, or looked at two pages or more, or included a key event. The engagement rate is the share of visits that were engaged.

Bounce

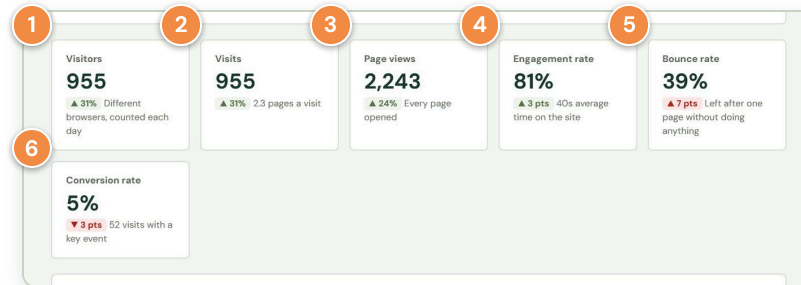
A visit that looked at one page and did nothing on it: no call, form, download or link out. The bounce rate is the share of visits that bounced. A lower bounce rate is better.

Key event

An action you decided matters, such as someone tapping your phone number or sending the contact form. You choose them in Setup.

Conversion

A visit that included at least one key event. The conversion rate is the share of visits that did.



- 1 Different browsers, counted each day.
- 2 How many visits, and how many pages each had on average.
- 3 Every page opened.
- 4 The share of visits that were engaged, and the average time people stayed.
- 5 The share of visits that left after one page without doing anything.
- 6 The share of visits that included a key event.

The six headline numbers, for the last 30 days.

Engagement and bounce are counted separately, so they do not add up to 100. Someone who reads one page for three minutes and leaves is engaged, because the page stayed on the screen for more than 10 seconds, and also a bounce, because they did nothing on it.

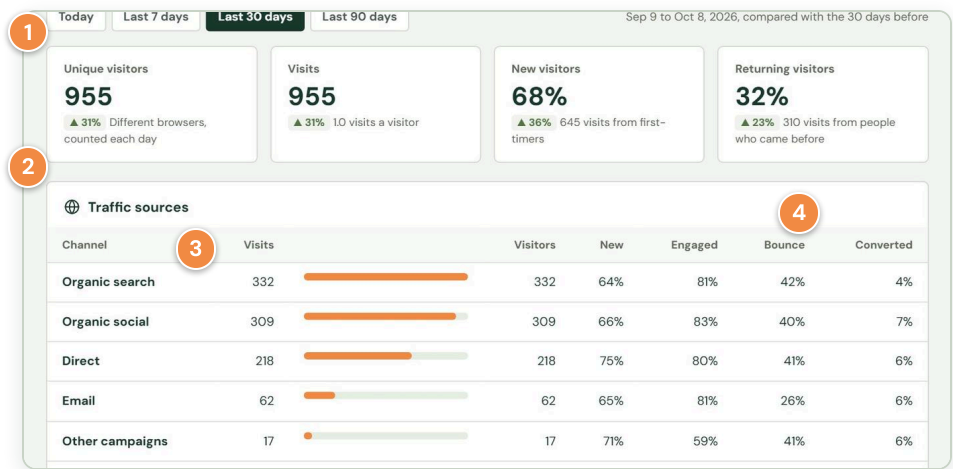
Below the tiles, the Overview has **Visits a day**, a bar for each day when you chose more than one. Then **Most viewed pages**, with views and the average time each page was on screen. Then **How visitors found you**, with a bar and a share for each channel. **Key events**, **New and returning** and **Mobile vs. desktop** sit at the bottom, each with a link to the tab that has more.

How people found you

WHERE TO FIND IT [Website](#) > [Analytics](#) > **Acquisition**

Store owner, Manager

The Acquisition tab answers where visits came from. The top tiles give unique visitors, visits, new visitors and returning visitors. A returning visitor is a browser that visited before, which Roadside learns from the visit cookie described under Setup. A browser that blocks cookies shows as *Not known*.



- 1 Unique visitors, visits, new and returning.

2 One row for each channel.
- 3 The channel, with its visits and a bar.

4 The share of that channel's visits with a key event.

Acquisition: the traffic sources.

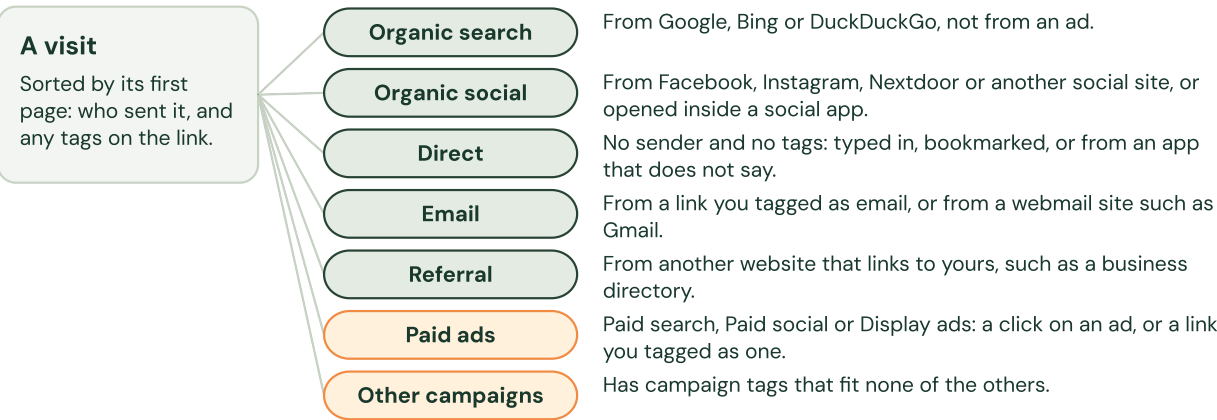
WORDS TO KNOW

Channel

The kind of place a visit came from. Roadside sorts every visit into one channel, from the first page it opened. *Referral* is one of them: a visit that came from another website that links to yours.

Campaign

One particular push you made, such as a spring sale or the Chick Days email. A link tagged with a campaign name shows up under that name.



The channels, and what puts a visit in each.

Further down the tab is a card headed Organic click-through rate that says *Not connected yet*. It has nothing to show, so skip it. Under the table, **Sites that sent visitors** names the websites that sent the most visits, and **Campaigns** lists your tagged links with their visits. To track a link, add campaign tags to the end of its address before you post it. For example, a Facebook post could link to `https://www.bakerfeedandcountrystore.com/?utm_source=facebook&utm_medium=social&utm_campaign=spring-sale`. The three tags are the source (where you put the link), the medium (the kind of place) and the campaign (the push). Each tagged link shows in the Campaigns table. Ask for help at support@dirtyroadsoftware.com if you want these made for you.

Engagement and the Pages tab

WHERE TO FIND IT

Website > Analytics > Engagement

Store owner, Manager

The Engagement tab shows how visits went. Its tiles are the engagement rate, the average engagement time, pages a visit and the bounce rate. Time counts only while a page is showing, its window is in front, and the person has moved, scrolled or typed in the last minute, so a tab left open all night adds nothing.

TodayLast 7 daysLast 30 daysLast 90 days

Sep 9 to Oct 8, 2026, compared with the 30 days before

1

Engagement rate

81%

▲ 3 pts 777 engaged visits

2

Avg. engagement time

40s

▲ 18% A visit, with a page in view

3

Pages a visit

2.3

▼ 6% 2,243 page views

4

Bounce rate

39%

▲ 7 pts 377 left after one page, doing nothing

A visit is **engaged** when it lasts 10 seconds or more with a page in view, sees 2 pages or more, or has a key event. It **bounces** when it sees one page and nothing is done on it (no call, form, download or link clicked).

Top landing pages

Where visits start	Visits	Engaged	Bou
Home page /	346	80%	2
Shop /shop	73	70%	4
Horse feed	61	80%	3

Top exit pages

Where visits end	Exits	Share
Shop /shop	134	14%
Home page /	116	12%
Poultry	69	7%

1

The rates for the days you chose.

2

The plain definitions of engaged and bounced.

3

Where visits start: the landing pages.

4

Where visits end: the exit pages.

Engagement.

The tab lists your top landing pages (the first page of a visit), your top exit pages (the last), the pages people spend longest on, and engagement by channel. Page names link to that page's own view. Every list names a page by its title, without your store's name on the end. The home page is *Home page*, and a

page with no title is named by its address.

WHERE TO FIND IT

Website > Analytics > Pages

Store owner, Manager

The Pages tab lists every page of your website that was visited. Type part of a name in **Find a page** and press **Find**. The **Sort by** buttons put the most viewed, longest read, furthest read, most often landed on, or most often left from first.

COLUMN	WHAT IT SHOWS
Views, Visits	How many times the page was opened, and in how many visits.
Avg. time	How long the page was showing on average.
Read	How far down the page visitors got, on average, as a percent.
Entrances	Visits that started on this page.
Bounce	Of those entrances, the share that left after this page with nothing done.
Exits, Exit rate	Visits that ended here, and that number as a share of the page's views.

1

2

3

4

5

Pages

Find a page

Find

View previous reports

Sort by

Most viewed

Longest read

Read furthest

Most visits start here

Most visits end here

Scroll the table sideways for more columns.

Page	Views	Visits	Avg. time	Read	Entrances	Bounce	Exits	Exit rate
Home page	366	362	13s	64%	346	29%	116	32%
Shop	286	253	13s	64%	73	40%	134	47%
Feed	168	160	13s	60%	60	27%	65	39%
Poultry	165	156	14s	63%	56	36%	69	42%

1

 Search by the page's name or address.

2

 Download an earlier quarter's page report.

3

 Change the order of the list.

4

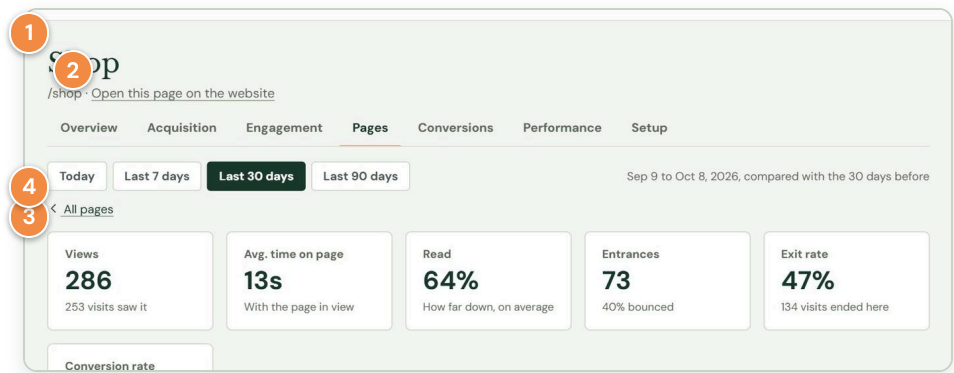
 One row for each page.

5

 How far down the page people got, on average.

The Pages tab.

Press a page's name to see that page on its own: its views each day, which pages people saw just before and just after it, the channels and devices behind its visits, what people did on it, and how fast it loads.



- 1

The page's name.
- 2

Opens the page on your website.
- 3

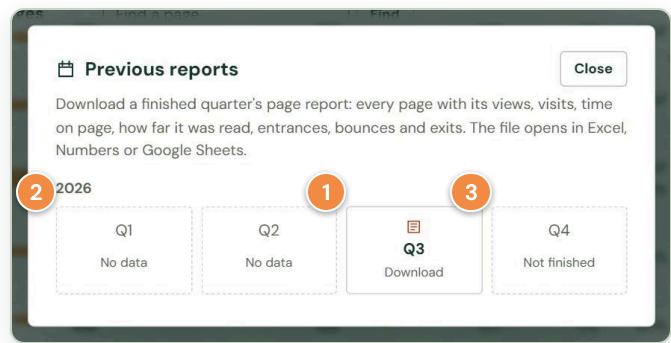
Views, time on the page, how far it was read, entrances, exits and conversions.
- 4

Back to the Pages list.

One page: its name and numbers.

Page reports to download

Press **View previous reports** to download a finished quarter's page report. Roadside keeps a page report for each finished quarter for three years, even though it keeps the individual visits for about 13 months. A quarter with a report shows **Download**. Others say *No data*, or *Not finished* for this year's quarters still running.



- 1

A finished quarter with a report. Press it to download.
- 2

A quarter before your website was counted.
- 3

A quarter that has not ended yet.

Previous reports.

The file is named for the quarter, such as `website-pages-2026-Q3.csv`. It opens in Excel, Numbers or Google Sheets and holds one row for each page, most viewed first: the page, its title, views, visits, average time in seconds, how far it was read, entrances, bounces, bounce rate, exits and exit rate.

Calls, forms and orders

WHERE TO FIND IT

Website > Analytics > Conversions

Store owner, Manager

The Conversions tab counts the actions you marked as key events. Its tiles show the conversion rate, how many visits converted, the key event completions, cart abandonment, and online orders when your store takes them.

1

2

3

☆ Key events				Choose key events		✓ Other events	
Event	Completions	Visits	Rate	Event	Count	Visits	
Phone number tapped	31	30	3%	Added to cart	52	50	
Form sent	16	16	2%	Directions opened	28	27	
Purchase \$1,770.37	10	10	1%	Checkout started	24	24	
Email address tapped	0	0	0%				

- 1

The events you chose as key events, with how many times each happened, in how many visits, and the share of visits.
- 2

Goes to Setup, where you choose them.
- 3

Everything else the tracker saw: videos played, files downloaded, links to other sites, searches, pages read to the end.

Key events and other events.

Under them, **What people clicked, called and downloaded** lists the actual phone numbers tapped, files downloaded, sites linked to and words searched for, with the page they were on. Conversion rate is also broken out by channel and by landing page. The cart card follows visits through three steps, **Added to cart**, **Started checkout** and **Bought**, and says how many reached each one.

WORDS TO KNOW

Cart abandonment

Of the visits that added something to the cart, the share that did not buy in that visit.

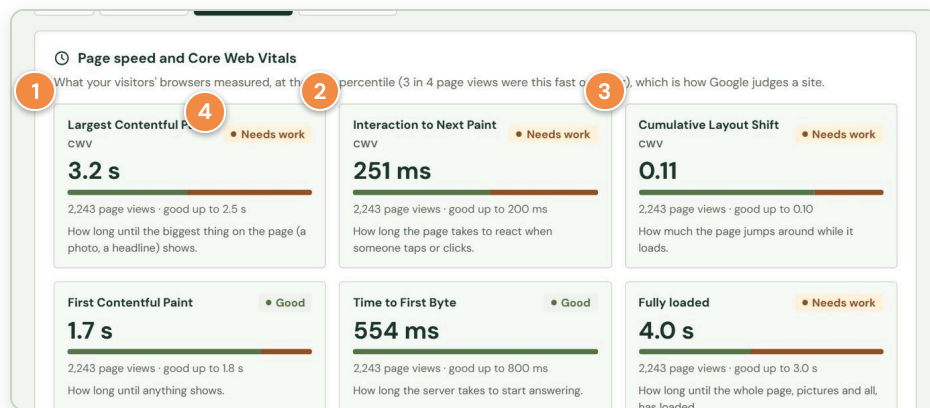
Orders placed at your online checkout are counted as a Purchase automatically, once for each order.

How fast your pages load

WHERE TO FIND IT  Website  Analytics  Performance

Store owner, Manager

The Performance tab shows what your visitors' browsers measured: how long your pages took to show and how quickly they reacted. Google judges a page's speed by three measures, called Core Web Vitals, and Roadside rates each one.



- 1 How long until the biggest thing on the page, a photo or a headline, shows.
- 2 How long the page takes to react when someone taps or clicks.
- 3 How much the page jumps around while it loads.
- 4 Good, Needs work or Poor.

Page speed and Core Web Vitals.

WORDS TO KNOW

Core Web Vitals

Google's three page-speed checks: how fast the main content shows (LCP), how fast the page reacts to a tap (INP), and how much it moves while loading (CLS).

75th percentile

The speed that 3 visits out of 4 matched or beat. Roadside rates on it so that a few slow visits do not spoil a page's rating.

A rating is Good, Needs work or Poor against Google's cutoffs, which each tile shows: for example, the biggest item on the page should show in 2.5 seconds or less, and a time over 4 seconds is Poor. Three more measures are on the tab: First Contentful Paint (until anything shows), Time to First Byte (how

long your website takes to start answering) and Fully loaded. A page is as good as its worst Core Web Vital. Safari and Firefox do not report every measure, so some come from Chrome and Edge visitors only. The tab also breaks visits down by device type, screen size, browser and operating system.

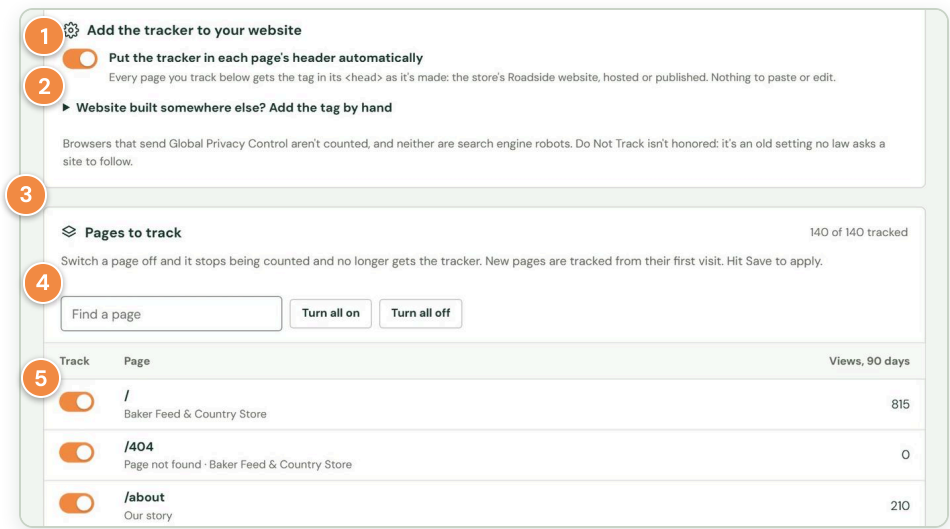
Setup

WHERE TO FIND IT

 Website >  Analytics > Setup

Store owner, Manager

Setup has no day buttons. Everyone who can see Analytics can read it. Only the Store owner and the Manager can change it.



- 1 Puts the tracker on each tracked page for you.
- 2 For a website built somewhere else. Leave it closed unless Dirt Road asks you to open it.
- 3 How many pages are tracked.
- 4 Look for a page by its name or address.
- 5 Turn one page off, or on again.

The top of Setup.

 CAREFUL

Leave **Put the tracker in each page's header automatically** on. With it off, and no tag put on the website by hand, nothing is counted.

Choose which pages are tracked

Every page of your website is tracked until you switch it off. A page you switch off stops being counted, which suits a thank-you page after an order. Use **Find a page** to find it, switch it off, and press **Save**. If a page is not on the list, type its address, such as `/thank-you`, in the box under the list. **Turn all on** and **Turn all off** act on the pages the box is showing. New pages are tracked from their first visit. Page switches go by address, so a renamed page counts as a new page. A page you turn off stops being counted now, and stops loading the tracker after your next website update.

Choose which events count as key events

☆ **Key events**
The things that matter to the store. A visit with any of them counts as a conversion, and the change applies to past visits too.

☒ Phone number tapped A tel: link	☒ Email address tapped A mailto: link	☒ Form sent Any form on the site (its name or id is the label)
☐ Directions opened A link to Google, Apple or Bing maps	☐ File downloaded A link to a PDF, document, spreadsheet or archive	☐ Link to another site A link that leaves the site (its host is the label)
☐ Site search The search page opened with a search (the term is the label)	☐ Video played A video on the page, or a YouTube video embedded with enablejsapi=1	☐ Read to the end The page scrolled 90% of the way down
☐ Added to cart RoadsideAnalytics.track('add_to_cart') from the store's cart	☐ Checkout started RoadsideAnalytics.track('begin_checkout')	☒ Purchase An online order placed, or RoadsideAnalytics.track('purchase', {value})

2 Your own events

quote_request, newsletter_signup

Names your site reports with data-track="name" on a button or link, or RoadsideAnalytics.track('name'). Separate them with commas.

1 Tick the actions that matter to your store.

2 Your own events, if your website reports any.

Key events.

A visit with any ticked event counts as a conversion. Roadside starts with four ticked: Form sent, Phone number tapped, Email address tapped and Purchase. Directions opened is worth ticking for a store people drive to. Your choice applies to every report, including days that have passed, so changing it changes the earlier numbers too.

The visit cookie

With **Tell visitors apart with two small cookies** on, a visitor's browser keeps two small files. One holds only the date of their last visit, so Roadside can tell a new visitor from a returning one. The other is a random code for the day, which the browser deletes when the day ends. Neither holds a name or anything else that points to a person. Roadside shows visitors no cookie banner. With the switch off, or in a browser that blocks cookies, a visitor counts as neither new nor returning.

What Analytics counts, and what it leaves out

For each page, the tracker reports the page's address (never anything after a question mark), its title, where the visitor came from and any campaign tags on the link. It also reports the screen width, how long the page was showing, how far down it was read, how fast it loaded, and what the visitor did. Roadside keeps the device type and the browser's name. It does not keep the visitor's IP address, the browser's full description, or anything a visitor typed into a form. A site search keeps the words searched for.

- **Not counted:** browsers that send Global Privacy Control, a setting some privacy-minded visitors switch on, and known robots such as search-engine crawlers and link checkers. The older Do Not Track setting is ignored: those visits are counted.
- **Counted:** your own visits to the live website. There is no setting to leave yours out.
- **Not counted:** payment pages. They never carry the tracker.
- **Kept for:** visits for about 13 months, then deleted. Each finished quarter's page report is saved first and kept three years.

Reading the numbers without over-reading them

A store with a few dozen visits a day will see a number swing for no reason you can find. A page that had 4 views last week and 6 this week shows an arrow up 50%, and the whole change is two people. Look at Last 30 days or Last 90 days before you decide that anything changed, and compare Saturdays with Saturdays: most stores are busiest on one weekend day, and a holiday week shifts things too.

Visitors are browsers on a day, so one person on two phones counts twice, and one person on the shop's Wi-Fi who comes back next Tuesday is a new visitor. A small difference between two channels, or between two pages, is not a result. A big change that holds for weeks is worth acting on, such as a drop in calls after you changed the contact page, or a jump in visits after a Chick Days post.

If the store also has Google Analytics, treat it as a separate count. The two will not match, because each defines visits and visitors in its own way and because Roadside leaves out browsers that send Global Privacy Control and known robots. Pick one for each question and stay with it.



PART 6

Your account with Dirt Road

Ask for website changes, and see your plan and your invoices.

24 Website changes

Some parts of your website are not on any screen in Roadside: the big photo at the top of the home page, a paragraph on Our story, the layout of the Shop page. You send those to Dirt Road as a website change, and Dirt Road makes them.

IN THIS CHAPTER

- What counts as one website change
- Jobs you do yourself and jobs you send to Dirt Road
- How many changes you get each month
- Sending a request, with photos and files
- What each status means
- Answering a question and checking the work
- Withdrawing a request, and the emails you get

What counts as one website change

WHERE TO FIND IT  **Website** ›  **Website changes**

Store owner, Manager

A website change is a request to Dirt Road for something on your website that you cannot edit in Roadside. One change covers related updates to one page. A new photo and two paragraphs on the same page is one change.

A homepage redesign, new navigation and a new page sent together are bigger than a standard change. Dirt Road talks that kind of request through with you before starting any work that costs extra.

WORDS TO KNOW

Website change

A request you send to Dirt Road for a change to your website that you cannot make yourself. It has a number, a status and a thread of notes between you and Dirt Road.

Allowance

The number of website changes your plan includes each month. It starts over on the first of the month. Changes you do not use do not carry over.

Website day

A day Dirt Road sets aside to work on website changes. A new request waits for the next one.

Jobs you do yourself and jobs you send to Dirt Road

Photos, wording and the layout of a page belong to your website's design, which Dirt Road looks after. Facts about the store, products, stock and orders are yours to change in Roadside, and they reach the website without a request. Store info has a box on the right, **Need something else changed?**, with a **Request a change** button for the same reason.

THE JOB	WHO DOES IT	WHERE
Change your hours or add a closed day	You	Chapter 3, Hours, closed days and contact details (page 18)
Change the phone number, address or email on the website	You	Chapter 3, Hours, closed days and contact details (page 18)
Put a message in the sign at the top of every page	You	Chapter 4, The sign at the top of your website (page 25)
Change a product's price, size, photo or description	You	Chapter 10, Add or edit a product (page 66)
Mark a product in stock or out of stock	You	Chapter 13, Stock (page 90)
Show your Google rating and pick the reviews to feature	You	Chapter 6, Reviews, and questions and answers (page 39)
Send an old web address to a new page	You	Chapter 7, Old links (page 45)
Swap the big photo at the top of the home page	Dirt Road, as a website change	This chapter
Rewrite a paragraph or fix a typo on Our story	Dirt Road, as a website change	This chapter
Add a box to the Shop page, such as Hay and Straw	Dirt Road, as a website change	This chapter
Change the menu at the top or the footer at the bottom	Dirt Road, as a website change	This chapter
Add a new page, such as hay delivery	Dirt Road, as a website change	This chapter

How many changes you get each month

Your plan sets how many website changes you can send each month and how many days Dirt Road has to finish each one. The pictures in this chapter show 10 a month and 7 days. The **Website changes** row on Account shows the numbers for your store (Chapter 25, Account and Billing (page 202)).

A request counts against the month you sent it, using your store's time zone. Two kinds do not count: a request Dirt Road marks *Outside plan* and a request you withdraw. If you have used the month's changes you can still send another. Roadside says so on the form, and Dirt Road checks with you before doing anything that costs extra. If your plan is suspended, cancelled or expired, the form shows a red banner and new requests pause until the plan is paid; What happens when a payment is late, in Chapter 25 (page 204) explains it.

The screenshot shows the 'Website changes' interface. At the top, a header bar contains the title 'Website changes' and a button labeled '+ Request a change' (callout 3). Below the header, a progress bar indicates '7 of 10 website changes left in October' (callout 1). A sub-header explains: 'One change covers related updates to one page. We finish each within 7 days. Unused changes don't carry over; you get 10 again on November 1.' Below this is a filter bar with 'Open 3', 'Done 2', and 'All 5' buttons (callout 2). The main content is a table with columns: Request, Page, Status, and Sent.

Request	Page	Status	Sent
Add a Hay and Straw section to the Shop page #25	Shop	Needs information Waiting on you (callout 5)	Oct 6
Swap the home page photo for the fall one #24	Home page	In progress Due Oct 12 (callout 4)	Oct 5
Fix a typo in Our story #26	Our story	Ready for review Ready for you to check	Oct 3

- 1 How many changes are left this month, and the day the count starts over.
- 2 Open requests, Done requests, or All. Open is the one you land on.
- 3 Press this to send a new request.
- 4 While Dirt Road has a request, the day it is promised for. The date shows in red if it passes.
- 5 Words in orange under a status mean the next move is yours: Waiting on you, or Ready for you to check.

The Website changes screen.

Send a request

Press **Request a change**, either on Website changes or in the box on Store info. The form is one screen.

- 1 **Name the change.** Type it in **What needs changing?**, for example *Update the Chick Days date*.

- 2 **Choose the page.** Click in **Which page?** and a list appears: Home page, Shop, Contact page, Search results, Every page (header or footer), each department of your online store, and your website's other pages. Send separate requests for separate pages.
- 3 **Say what to change** in **Describe the change.** Give the new wording, or say which attached photo to use.
- 4 **Say where** in **Where on the page?** if the page has several places it could be. This box is optional.
- 5 **Add photos or files** if they help, then press **Send to Dirt Road.**

The request opens with a line such as *Sent. We'll have it done by Tuesday, Oct 14.* The date is the day you sent it plus your plan's days to finish. Dirt Road is told at once. You do not get a confirmation email, because the request itself is your record: it stays in your list with its number.

What needs changing?

Change the Chick Days date

Which page?

Home page

One request covers one page. Send separate requests for separate pages.

Describe the change

Change the Chick Days date to March 14 and swap the photo for the one attached.

Where on the page? (optional)

The yellow box under the big photo

- 1 A short name for the job. Up to 160 characters.
- 2 Pick a page from the list that drops down, or paste its web address. One request covers one page.
- 3 What to change, in your own words. Up to 6,000 characters. Say which photo to use.
- 4 Where on the page it is, if that helps. A box, a color or the words next to it will do.

The top of the request form, filled in.

Photos and files



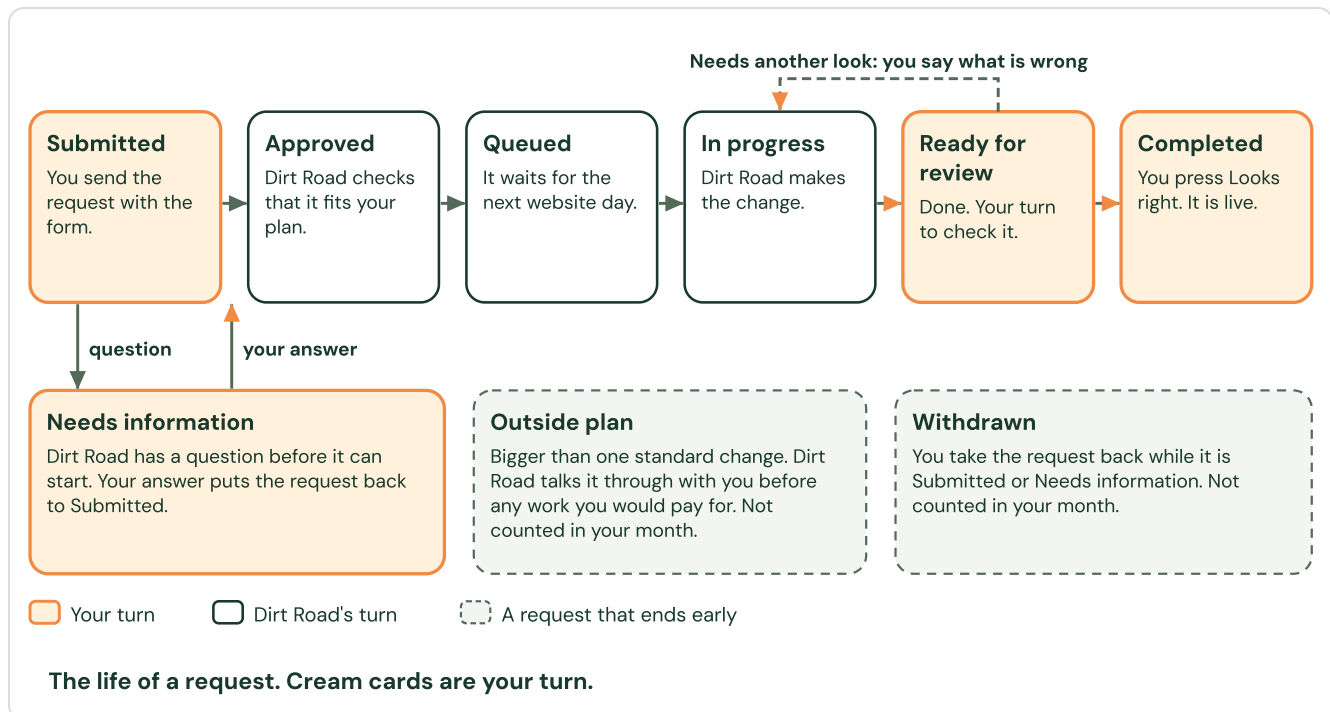
A phone photo of the new display is all Dirt Road needs.

The drop area under **Photos and files** takes JPEG, PNG, WebP, GIF and HEIC photos, PDFs, text and CSV files, and Word and Excel files. A file's name has to match what is inside it, so a photo renamed to end in `.pdf` is refused.

- **Drag, choose or paste.** Drag files onto the box, press **Choose files**, or paste a screenshot with `Ctrl` and `V` (on a Mac, `Cmd` and `V`) anywhere on the page.
- **On a phone or tablet**, a **Take a photo** button opens the camera.
- **Size.** Each file can be about 6 MB. Photos over 2.5 MB are made smaller before they are sent, and phone photos in HEIC form are sent as they are. If a file is too big the form says *This file is over 6 MB. Send a smaller copy, or email it to us.* The address for that is **support@dirtyroadsoftware.com**.
- **Count.** One message can carry up to 20 files. Each starts to upload as soon as you add it, and shows its name and size with a **Remove** link. The **Send to Dirt Road** button waits until they finish. A file you add but never send is deleted after 2 days, and only the people on your team who can see Website changes, and Dirt Road, can open the files on a request.

What each status means

Every request has a status that says where it is. Roadside shows it as a colored tag in the list and at the top of the request.



STATUS	WHAT IT MEANS	WHO MOVES IT
Submitted	Dirt Road has the request and will queue it for the next website day. You see this again after you answer a question.	You, by sending it
Needs information	Dirt Road has a question before it can start. Its note is on the request, and the list says <i>Waiting on you</i> .	Dirt Road
Approved	It fits your plan and Dirt Road accepted it.	Dirt Road
Queued	It is lined up for the next website day.	Dirt Road
In progress	Dirt Road is working on it.	Dirt Road, or you with Needs another look
Ready for review	It is done. Look at the page and say whether it is right. The list says <i>Ready for you to check</i> .	Dirt Road
Completed	Done and live on your website. The request is closed.	You, with Looks right, or Dirt Road
Outside plan	Bigger than one standard change. Dirt Road talks it through with you before any work that costs extra. It does not use up one of your changes.	Dirt Road
Withdrawn	You took the request back. It does not use up one of your changes.	You

The due date under a status is Dirt Road's promise. It runs from the day you sent the request, and it stops while a request is waiting on you. When you answer a question, Dirt Road gets the full number of days again.

Open a request, and answer a question

Press a request's name in the list to open it. The top shows its status and what that means, then your request, then **Updates**: the notes between you and Dirt Road, oldest first. Each note from Dirt Road says when it was written and shows the new status if the note changed it.

WEBSITE CHANGES

Add a Hay and Straw section to the Shop page

All requests

#25 - Shop

Needs information

We have a question before we can start. Our note is below.

The request

PageShop

SentOct 6, 2026 12:00 AM by Dana Whitfield

I'd like a Hay and Straw box on the Shop page next to Horse and Poultry. We sell square bales most of the year.

Where on the page: Next to the Horse and Poultry boxes

7 of 10 website changes left in October

One change covers related updates to one page. We finish each within 7 days. Unused changes don't carry over; you get 10 again on November 1.

3

Updates

Dirt Road - Oct 7, 12:00 AM

Status:Needs information

We can add a Hay and Straw box. Do you want it to link to a department page of its own, or to the Farm department?

- 1

The status and what it means. Needs information is amber.
- 2

What you sent: the page, who sent it and when, your words, and your note about where.
- 3

Dirt Road's note with its question.
- 4

The month's count, as on the list.

A request that has a question waiting for you.

When the status is Needs information, a card called **Answer our question** sits under the notes.

1

Answer our question

Your answer

2

Drag photos or files here, paste a screenshot, or

Choose files

Photos, screenshots, PDFs and Word or Excel files. Big phone photos are shrunk before they're sent.

3

Send

4

Withdraw this request

- 1

Type your answer here.
- 2

Add a photo or file if it answers the question better than words.
- 3

Press Send. The request goes back to Submitted with a fresh due date.
- 4

Withdraw this request, if you would rather drop it. More on that below.

The card for answering Dirt Road's question.

On a request in any other open status, the same card is called **Add a note**. Use it for anything Dirt Road should know, such as a change of mind or a better photo. Nothing in the status changes when you add a note.

Check the finished work

When a request reaches Ready for review, open the page on your website and look at it. The request page then shows a card called **Is it right?**

- 1 The page looks the way you wanted. This marks the request Completed.
- 2 If something is still wrong, say what. The box is required for this choice.
- 3 Press this to send the request back to In progress with your note.

The card that closes a request.

- 1 **Look at the page** on your website, and on a phone as well, since many customers will see it there.
- 2 **Press Looks right** if it is correct. Roadside says *Marked complete. Thanks for checking it.*
- 3 **Or type what still needs to change** in **What still needs to change?** and press **Needs another look**. Roadside says *Sent back to us with your notes.* You can attach a photo of the problem.

A Completed request is closed. Roadside says *This request is closed. Send a new request instead* if you reply to it, and the page offers a **Send a new request** link.

Withdraw a request

You can take a request back while its status is Submitted or Needs information. Press **Withdraw this request** and confirm. Roadside says *Withdrawn. It won't count against this month.* After Dirt Road approves a request you cannot withdraw it. Add a note to say you no longer want it.

Emails about your request

When Dirt Road writes back, the person who sent the request gets an email with the title, the new status, the message and a link to open the request. The subject reads *Website change #25: Needs information* when the status moved, and *A note about website change #25* when it did not. Only the sender gets it, so forward it if someone else should see it.

25 Account and Billing

Account shows your Roadside plan with Dirt Road Software and whether it is paid up. Billing lists what you owe, your invoices and how you pay. Both screens are for the Store owner: a Manager does not see them in the menu.

IN THIS CHAPTER

- Your plan on the Account screen
- What each status badge means
- What happens when a payment is late
- Billing: your balance, invoices and saved ways to pay
- Opening an invoice from an email
- Signing an invoice, and paying it

Your plan on the Account screen

WHERE TO FIND IT  **Website** >  **Account**

Store owner only. A Manager does not see this screen.

Account answers three questions: what Dirt Road provides your store, whether it is paid, and what you have been billed. When you open it, Roadside asks Dirt Road for the latest if the last check was more than 15 minutes ago, so a payment you made a minute ago shows up. Roadside also checks on its own every 6 hours.

WORDS TO KNOW

Plan

What Dirt Road provides for your store: Roadside, and how many website changes you get each month.

Paid through

The date your plan is paid up to. During a trial the same line reads *Trial ends*.

License

The record Dirt Road keeps of your plan: what it includes and whether it is paid. Two of the status badges below use the word.



Your plan		Active
Plan	Roadside	2
Account	Baker Feed & Country Store	
Paid through	Nov 1, 2026	
Website changes	10 a month, each done within 7 days	
Next invoice	Nov 1, 2026 · \$99.00 · paid automatically	

- 1 The plans status. Green means everything is in order.
- 2 The plan, the account name, the date it is paid through, the website changes you get, and the next invoice with its date and amount. *Paid automatically* appears when Dirt Road charges your saved card or bank account itself.
- 3 Your invoices from Dirt Road, newest first.
- 4 Receipt opens a paid invoice. An unpaid one has View & pay instead. Both open in a new tab.

Account for a store whose plan is paid.

When something is owed, a **Balance due** line appears in bold under the facts, with a **Pay now** button. Dirt Road can also post a short notice under the plan card, in a blue box, or in a red one when it is urgent.

A store that Dirt Road has not linked yet shows this instead. Everything works as usual in the meantime.

1

Your plan

Your plan's details show here once Dirt Road has linked your store to its account. Everything works as usual meanwhile.

No license key yet

2

- 1 The badge reads No license key yet.
- 2 The note says the plan's details will appear once the link is made.

Account before Dirt Road has linked the store to its records.

What each status badge means

BADGE	WHAT IT MEANS	WHAT CHANGES FOR YOU
No license key yet	Dirt Road has not linked your store to its record of your plan.	Nothing. Everything works.
Waiting for the first license check	The link is made and Roadside is waiting for Dirt Road's first answer.	Nothing. Everything works.
Trial	You are in your trial. <i>Trial ends</i> shows in place of Paid through.	Nothing. Everything works.
Active	The plan is paid.	Nothing.
Payment past due	An invoice is unpaid.	Everything works. A banner asks you to pay.
Suspended, Cancelled or Expired	The plan is unpaid, has ended, or Roadside has not been able to reach Dirt Road to check it for a long while.	The website stays online. Saving Store info and sending new website changes pause. Signing in, Account, Billing and paying still work.

What happens when a payment is late

An unpaid invoice first turns the badge amber and puts a banner under the top bar of every screen the Store owner opens. The banner has a **Pay now** link. Nothing stops working.

Baker Feed & Country Store / Account

Q Find anything...+ New

⚠ Your Roadside plan has an unpaid invoice. Pay it to keep everything running. [Pay now](#)

Account

Your Roadside plan with Dirt Road Software: what it includes, when it's paid through and your invoices.

Your plan

Payment past due

Plan	Roadside
Account	Baker Feed & Country Store
Paid through	Nov 1, 2026
Website changes	10 a month, each done within 7 days
Next invoice	Nov 1, 2026 · \$99.00
Balance due	\$99.00

[Pay now →](#)

1

2

3

4

1

2

3

4

1

2

3

4

1

The banner on every screen. Pay now opens Dirt Road's payment page in a new tab.

2

Payment past due.

3

What is owed.

4

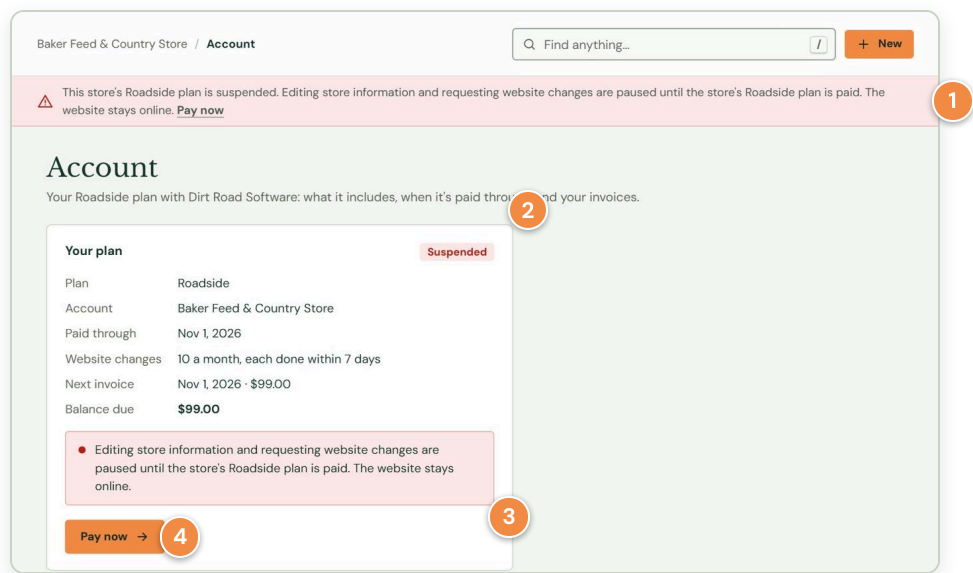
The same Pay now link on the Account screen itself.

A plan with an unpaid invoice.

Dirt Road Software

204

If the plan stays unpaid and Dirt Road suspends it, the banner turns red and everyone in your store sees it, with the Pay now link shown only to the people who can open Account. Two jobs pause for everyone in your store until the plan is paid: saving Store info, and sending new website change requests. The website itself stays online. Your team can still sign in, and you can still open Account and Billing to pay.



- 1

The red banner says the plan is suspended and what is paused.
- 2

Suspended, in red.
- 3

The same message on the plan card.
- 4

Pay now.

A suspended plan.

After you pay, open Account. The badge changes to Active once Roadside has Dirt Road's answer. Card payments usually show within seconds, and bank payments take a few days. If the badge is wrong a day later, write to support@dirtyroadsoftware.com and give the invoice number.

Billing: what you owe and how you pay

WHERE TO FIND IT

Website

Billing

Store owner only. A Manager does not see this screen.

Billing asks Dirt Road's billing system for its figures each time you open it, so it shows what Dirt Road has right now. It has four cards.

Balance

Past due

1

Account

Baker Feed & Country Store (4829K1054)

Balance due

\$99.00

Past due

\$99.00

2

Invoices

3

Invoice	Date	Amount	Status	
D-1008 bakerfeedandcountrystore.com	Sep 15, 2026 due Oct 1, 2026	\$99.00	Past due	View & pay
D-1007 bakerfeedandcountrystore.com	Aug 15, 2026	\$99.00	Paid	Receipt
D-1006 bakerfeedandcountrystore.com	Jul 15, 2026	\$99.00	Paid	Receipt

4

- 1

Your account name and the client number Dirt Road uses for you, with the balance due. Give that number when you write to Dirt Road about billing.
- 2

A red Past due tag and amount appear when an invoice is late.
- 3

Each invoice with its date, its due date while unpaid, and its amount. An amount part paid shows how much is left.
- 4

View & pay opens the invoice page. Paid invoices have Receipt. Voided and Closed invoices have View and need nothing from you.

The Balance and Invoices cards.

Subscriptions

Roadside

Past due

\$99.00 a month. Next bill Nov 1, 2026, paid automatically.

1

Ways you pay

2

Visa ending 4242, expires 12/2030 (used for automatic payments)

- 1

Each subscription: what it is, its status, what it costs each month or year, and the next bill date. A subscription that is ending says *Ends* and the date, with no more invoices after that.
- 2

The cards or bank accounts Dirt Road has on file, with their expiry dates and which one pays automatically.

Subscriptions and Ways you pay.

You cannot change the card on file from this screen. To change it, write to **support@dirtroadsoftware.com**. Billing never shows full card numbers.

 GOOD TO KNOW

Where Billing cannot show its figures it says why. *Your billing shows here once Dirt Road Software has linked your company to its billing means the link is not made yet. Billing couldn't be reached just now. Try again in a minute* means Roadside could not get an answer from Dirt Road's billing system.

Open an invoice from an email

Dirt Road's invoice and reminder emails have a link to view and pay the invoice. The link opens the invoice without signing in to Roadside, so you can use it from your phone. The long link is the key to the invoice: forward the email only to someone who should pay it.

1

Invoice D-1008

For Baker Feed & Country Store (bakerfeedandcountrystore.com). Issued September 15, 2026, due October 1, 2026.

Past due

2

\$99.00

3

Description	Amount
Roadside, monthly plan October 1, 2026 to October 31, 2026	\$99.00
Total	\$99.00

- 1

The invoice number, who it is for, the day it was issued and the day it is due.
- 2

The amount due, with a tag: Amount due, Past due, or Paid with the date.
- 3

What the invoice is for, with the period it covers. Tax, payments already made and the balance appear below when there are any.

An unpaid invoice, as the email link opens it.

Below the lines you may see Dirt Road's note and a list of payments received. If someone has signed the invoice, it says *Signed by* and the name. A signed-in person gets an **All your billing** link at the top. There is no print button: use your browser's own print command to make a paper or PDF copy.

Sign an invoice, and pay it

Sometimes Dirt Road's billing asks for a signature before an invoice can be paid. Then the invoice shows **Sign this invoice** and no Pay button yet.

The screenshot shows a form titled "Sign this invoice" with the text "I accept this invoice and the terms of my Roadside plan." below it. The form contains a text input field labeled "Your full name" with a red circle '1' next to the label. Below the input field is a checkbox labeled "I accept" with a red circle '2' next to it. At the bottom of the form is an orange button labeled "Sign" with a red circle '3' next to it. Below the form, there are three numbered instructions: 1. Type your full name. 2. Tick I accept. 3. Press Sign. The page says *Signed. Thank you.* and the payment choices appear.

1 Your full name

2 ☐ I accept

3 Sign

1 Type your full name.

2 Tick I accept.

3 Press Sign. The page says *Signed. Thank you.* and the payment choices appear.

The signature box.

If the name is empty or the box is not ticked, the page says *Type your full name and tick "I accept" to sign the invoice.*

Pay \$99.00

Pay \$99.00 1

2 You finish on the card processor's secure page (card or bank account).
Dirt Road never sees your card or bank numbers.

Or pay by bank transfer or check

3 Checks to Dirt Road Software.
Bank transfer details are on the invoice email.
Please include D-1008 with your payment.

- 1 Press Pay. A card form opens on the page, or you go on to the card processor's own secure page.
- 2 Dirt Road never sees your card or bank numbers. The processor does.
- 3 Instructions for paying by bank transfer or check. Write the invoice number on the payment.

Paying an invoice.

When the payment goes through, the page says *Thank you. Your payment went through.* Sometimes it says *Your payment shows here once the card processor confirms it, usually within seconds.* Bank payments take a few days. If a payment fails, the page says *The payment didn't go through. Try again, or use another card or bank account.* A link that no longer works says *This invoice link isn't valid.* Ask Dirt Road Software for a new one.

CAREFUL

The card form can sit on the invoice page or on the card processor's own page. Either way your card and bank details go to the card processor, and Dirt Road does not see them.



PART 7

People and security

Who can do what, and how to keep the panel safe.

26 Your team and what each role can do

Everyone who signs in to Roadside has one role, and the role decides what that person can open and change. This chapter covers the four roles Dirt Road sets up, what each can do, and how to add, change and remove the people on your team.

IN THIS CHAPTER

- What a role is
- The four roles, and who can do what
- Adding someone to your team
- Changing a role, turning someone off, removing someone
- Helping a team member who is locked out
- Changes only Dirt Road makes, and what to put in the email

What a role is

A role works like a job title on the schedule. The counter person gets the screens a counter person needs. The person who helps run the store gets more. Roadside leaves out what a role cannot use, so a team member sees a shorter menu and fewer buttons.



Show a new person around on their own sign-in, with the role you chose for them.

 WORDS TO KNOW**Role**

A job title inside Roadside that decides which screens and buttons a person gets. Each person has one role in your store.

Invitation link

A private link that lets a new person choose a password and finish setting up their sign-in. It works once and stops working after 7 days.

The four roles

The **Store owner** and the **Manager** run the store day to day. They can do the same things on the website, the products, the orders, the customers and the email list, and both can refund. They differ in three places. Only the Store owner opens **Account** and **Billing**, because those hold the plan and the invoices. Only the Store owner adds and removes team members and changes their roles. Only the Manager opens the **audit log**, a list of who signed in and who changed what.

The **Staff** and **Read only** roles are the lighter ones. Staff is for the counter and the shelves: look up customers, adjust stock, work the online orders, write articles. Read only is for someone who should see things without changing any of them.

The Store owner lands on Website home after signing in. The other roles land on the Dashboard. Staff and Read only people see a short menu: Dashboard, Accounts, Contacts, Compliance watch and Products, plus Articles when your store uses them and Online orders when it takes orders online.

THE JOB	STORE OWNER	MANAGER	STAFF	READ ONLY
Change hours, closed days, phone and address; the Store sign; Reviews, Questions and answers, Old links	Yes	Yes	No	No
Read messages from the website and the assistant's conversations	Yes	Yes	No	No
Send and follow website changes	Yes	Yes	No	No
Open Account and Billing and pay Dirt Road	Yes	No	No	No
Look at products and stock levels	Yes	Yes	Yes	Yes
Add and change products, categories and brands, and import products	Yes	Yes	No	No
Receive, count and adjust stock	Yes	Yes	Yes	No

THE JOB	STORE OWNER	MANAGER	STAFF	READ ONLY
Look at online orders	Yes	Yes	Yes	Yes
Mark orders ready, picked up or cancelled	Yes	Yes	Yes	No
Refund an online order	Yes	Yes	No	No
Change online store settings: open or closed, pickup, delivery, order emails, policies	Yes	Yes	No	No
Read articles, including drafts	Yes	Yes	Yes	Yes
Write articles and send them for review	Yes	Yes	Yes	No
Publish and schedule articles, and change article settings	Yes	Yes	No	No
See Analytics, and choose what it tracks	Yes	Yes	No	No
Look at customer accounts and contacts	Yes	Yes	Yes	Yes
Add and edit customer accounts and contacts	Yes	Yes	Yes	No
Archive, restore and export customer accounts	Yes	Yes	No	No
Use the email list: add, import, export, unsubscribe	Yes	Yes	No	No
Add, change and remove people on the team	Yes	No	No	No
Open the audit log	No	Yes	No	No

Compliance watch shows to anyone who can look at customer accounts, so all four roles see it. If someone opens a screen their role does not include, Roadside says *You don't have access to this page* and adds *Ask an administrator if you need it*. In your store that means the Store owner or a Manager. It is the role at work, not a fault. To see who changed something without the audit log, look at the **Latelly** list on Website home or **Recent activity** on the Dashboard. Each shows the last 8 changes and who made them.

Add someone to your team

WHERE TO FIND IT  **Admin** › **Users**

Store owner

A Manager who needs someone added or removed asks the Store owner. Users lists everyone who can sign in to your store, with their role, whether their two-step sign-in is set up, and when they last signed in. The form on the right invites a new person.

ADMINISTRATION

Users

People with access to Baker Feed & Country Store.

Name	Role	Two-factor	Last sign-in
Ben Carter ben.carter@example.net	Read only Invited	Pending	—
Dana Whitfield dana@bakerfeed.test	Store owner	On	Oct 8, 12:55 AM
Luis Ortega luis.ortega@example.net	Manager	On	Oct 5, 11:39 PM
Mia Tran mia.tran@example.net	Staff	On	Oct 6, 11:39 PM

Invite someone

Email

First name Last name

Role

Staff

Create invitation

New users get a private one-time link to set their password, then set up two-factor at first sign-in.

- 1 Everyone with access to your store.
- 2 Each person's role. Staff is the one the form starts with.
- 3 Invited means the person has not chosen a password yet. Pending under Two-factor means they have not set up their authenticator app.
- 4 The trash icon removes a person, or cancels an invitation that has not been used. You do not get one on your own row.
- 5 The Invite someone card.

Users, with the form for a new person on the right.

- 1 **Fill in the form.** Type the person's **Email**, **First name** and **Last name**, and choose a **Role**.
- 2 **Press Create invitation.** Roadside asks you to confirm it's you: your password and the current code from your own authenticator app. After that, sensitive changes stay unlocked for 10 minutes.
- 3 **Check the notice at the top.** It says *Invitation emailed to* and the address. The email is titled *You're invited to* and your store's name. A box called **Private invitation link** also shows the link once, with a **Copy** button. Copy it before you leave the page if you want a spare to send yourself.
- 4 **The person opens the link,** types a first and last name and a password of at least 14 characters, signs in, and sets up their two-step sign-in. Chapter 27, *Signing in safely* (page 218) walks them through it.

Until they do, the list shows *Invited* beside their role. If an invitation goes missing or runs out, open the person from the list and press **New invitation link**. Earlier links stop working. If the email address already belongs to someone with a Roadside sign-in, perhaps at another store, Roadside adds them with the role you chose and says *Existing user added to this workspace*. It sends no email in that case.

Choose the role by the job. Staff suits the counter. Read only suits a part-time helper who only needs to look things up. Manager suits a person who helps run the store. Give Store owner only to a co-owner, because it also opens Account and Billing. The list also shows Owner and Administrator. Only a person who already holds one of those can give them out, so Roadside refuses if you pick one, and you cannot change or remove someone who holds one.

Change a role, turn someone off, or remove them

Press a person's name in the list to open their page. The **Access** card on the left has the role and the on and off switch. The **Security** card on the right has the buttons for sign-in trouble, covered in the next section.

- 1 Choose a different role, then press Save access.
- 2 Leave this ticked. It is what makes Roadside ask the person for a code.
- 3 Tick this to turn the person off. Press Save access.
- 4 Saving a change signs the person out of every browser. They sign in again and get the menu for their new role.
- 5 Reset two-factor, for someone who lost their phone.
- 6 Remove user takes the person off your team for good.

One person's page.

- **Change a role.** Pick the new **Role** and press **Save access**. Confirm it's you when asked.

- **Turn someone off.** Tick **Suspend access to this workspace** and press **Save access**. The person is signed out at once and stays on the list with a grey *Suspended* tag. If they try to sign in, Roadside says *No workspace yet*. Untick the box and save to turn them back on. Use this for a seasonal worker between seasons, or while you decide.
- **Remove someone.** Press **Remove user** on their page, or the trash icon on the list. Roadside asks *Remove* and the name, and says they lose access to your store. If they have no other Roadside sign-in, their account is deleted. What they entered stays, without their name on it. Removing cannot be undone. A person you remove needs a new invitation to come back. You cannot remove yourself.
- **Cancel an invitation.** The trash icon on a person who is still Invited says *Cancel the invitation* and the address. The link stops working.

CAREFUL

Removing a person from Roadside does not change logins outside it, such as the store's Facebook page, the card machine or the domain account. Change those yourself when someone leaves.

Help a team member who is locked out

The **Security** card on a person's page fixes the usual sign-in problems. Each button asks you to confirm it's you first.

THE PROBLEM	WHAT TO PRESS	WHAT HAPPENS
They forgot their password and the reset email does not reach them	Create password reset link	Roadside emails the link and shows it once in a Private link box that you can copy. It works once and lasts one hour.
They lost their phone and have no recovery codes	Reset two-factor	Their authenticator is cleared and they set it up again at their next sign-in. They get an email saying so, and their other sign-ins end.
A computer was lost, or someone left on bad terms	Forget remembered browsers	Every browser the person asked Roadside to remember asks for a code again.
They never used the invitation	New invitation link	The earlier link stops working. The new one lasts 7 days.
They see No workspace yet	Untick Suspend access, then Save access	They can sign in again.

If you are the one locked out and nobody else on the team can open Users, write to **support@dirtroadsoftware.com**.

Changes only Dirt Road makes

A few things about your store are set by Dirt Road. Write to **support@dirtroadsoftware.com** and say what you want.

TO CHANGE	WHAT TO PUT IN THE EMAIL
The store's name	The name exactly as it should appear. It changes in the panel's menu, top bar and browser tab.
The store logo	Attach the file. A PNG with a transparent background works best, and a JPEG or WebP is fine. Keep it under 4 MB. A wide logo suits best. The store logo shows at the top of your Articles. Your website's own logo is part of its design: send that as a website change. Chapter 24, Website changes (page 194) explains how.
The time zone	Name it, for example Central Time. It sets every date and time in the panel, whether the store shows as open, how the month's website changes are counted, and the dates on online orders.

27 Signing in safely

Your password and your phone keep strangers out of your website, your orders and your customer list. This chapter covers choosing a password, setting up two-step sign-in, what to do when you forget a password or lose a phone, and how long Roadside keeps you signed in.

IN THIS CHAPTER

- Choosing and changing your password
- Setting up two-step sign-in
- Recovery codes, and where to keep them
- Signing in each day, and remembered browsers
- If you forget your password
- If you are locked out or lose your phone
- Google and Microsoft sign-in
- How long you stay signed in

Choose and change your password

WHERE TO FIND IT **Your name** › **My account**

Everyone

A password has to be 14 to 128 characters long. Roadside has no rule about capital letters, numbers or symbols. A **passphrase**, which is a password made of four or five ordinary words that do not belong together, is easier to remember than a jumble and harder to guess. Pick words that have nothing to do with each other or with your store, and do not use the name of a product or a pet. A password manager works with the sign-in page if you use one.

Roadside turns a password down, and says why, in a few cases. It is under 14 characters. It is a guessable word such as *password* or a row of keyboard letters. It contains the first part of your email address, or uses fewer than 5 different characters. Or it appears in known data breaches. That last check uses a public list of leaked passwords, and only a short fingerprint of yours is looked up, never the password itself. A refusal reads like *This password appears in known data breaches. Choose a different one.* Change it and try again.

- 1 **Press your name** at the bottom of the menu. My account opens.
- 2 **Fill in the Password card**, then press **Change password**.
- 3 **Roadside says** *Password changed. Other sessions and remembered devices were signed out.* You stay signed in on this browser, and an email tells you the password was changed.

1 Current password

2 New password

3 Use 14 or more characters. A passphrase of four or five unrelated words works well.

4 Confirm new password

5 Change password

- 1 Your current password.
- 2 The new one.
- 3 The rule, in a line.
- 4 The new one again.
- 5 Press Change password.

The Password card on My account.

Set up two-step sign-in

Your password alone is not enough to open Roadside. After it, you type a six-digit number from an app on your phone. Someone who learns your password still cannot sign in without your phone. Roadside asks everyone on a store's team to set this up at their first sign-in. The screens call it *two-factor*.

WORDS TO KNOW

Two-step sign-in

After your password, a six-digit number from your phone. The screens call it two-factor authentication.

Authenticator app

An app on your phone that shows a new six-digit number every 30 seconds. Roadside names Google Authenticator, Microsoft Authenticator, 1Password and Authy. Any app that reads a QR code for sign-ins will do.

Recovery codes

Ten one-time codes Roadside shows once, for the day your phone is lost or broken. Each works one time.

- 1 **Put an authenticator app on your phone** before you start, from your phone's app store.
- 2 **Sign in** with your email and password. Roadside shows **Set up two-factor authentication**.
- 3 **Add an account in the app** and scan the QR code, or choose to enter a key and type the one shown under *Can't scan? Enter this key manually*. The key stays the same if you reload the page.
- 4 **Type the six-digit code** the app shows and press **Turn on two-factor**. If it says *That code did not match. Check that your phone clock is set automatically, then try the next code*, wait for a new number and try again.



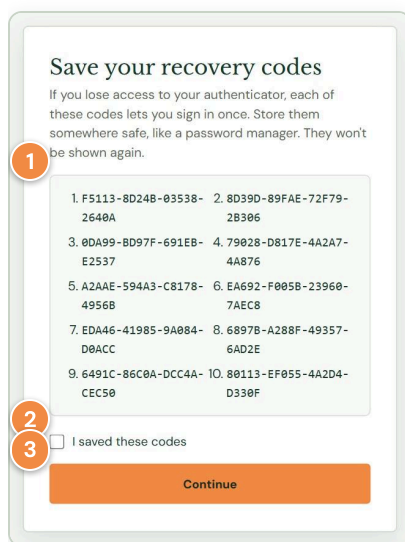
- 1 The QR code. Point your authenticator app's camera at it.
- 2 No camera, or the scan fails? Type this key into the app instead.
- 3 The six-digit code the app now shows.
- 4 Press Turn on two-factor.

The set-up screen, at your first sign-in.

Save your recovery codes

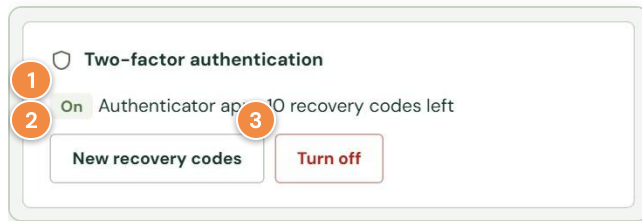
Straight after set-up, Roadside shows ten recovery codes. They appear once and are not shown again.

- **Keep them off the phone that holds the authenticator app.** Losing that phone is the reason you would need them. A password manager works, and so does a printed page in the office drawer.
- **New codes replace the old ones.** If you lose the page, press **New recovery codes** on My account. Roadside shows ten new codes and the old ones stop working. My account also says how many you have left.



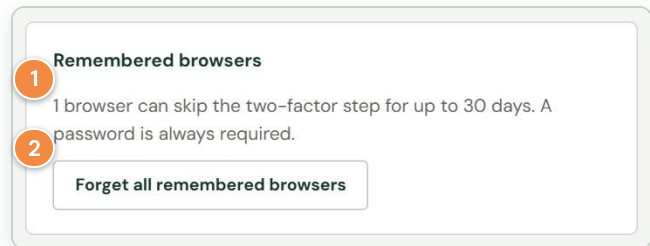
- 1 Ten codes. Each works once.
- 2 Tick this after you have saved them. Roadside will not go on until you do.
- 3 Continue signs you in.

The recovery codes screen.



- 1 On means two-step sign-in is working.
- 2 Replaces your recovery codes.
- 3 Turn off. Roadside refuses it for anyone the store requires two-step for.

The Two-factor authentication card.

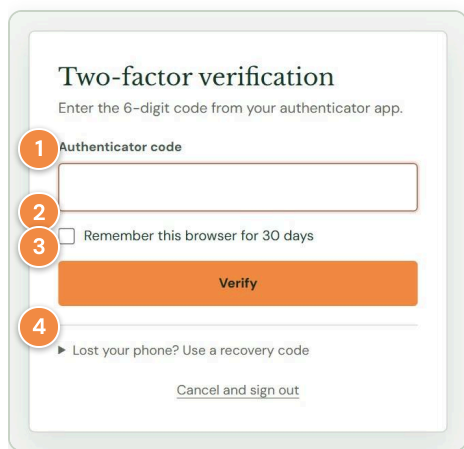


- 1 How many browsers skip the code step, and for how long.
- 2 Makes every browser ask for a code again.

The Remembered browsers card.

Sign in each day

- 1 **Type your email and password** on the sign-in page and press **Continue**.
- 2 **Type the six-digit code** from your authenticator app and press **Verify**.



- 1 The six-digit code from your phone. It changes every 30 seconds.
- 2 Skip this step on this browser for 30 days.
- 3 Press Verify.
- 4 No phone? This opens the box for a recovery code.

The code screen.

Each code works once, and Roadside accepts the one before and the one after the current one, so a phone clock that is slightly off still works. If it says *That code is incorrect or already used. Wait for the next code and try again*, wait for the number on your phone to change and type the new one. After 10 wrong tries in 5 minutes it says *Too many attempts. Please wait five minutes*.

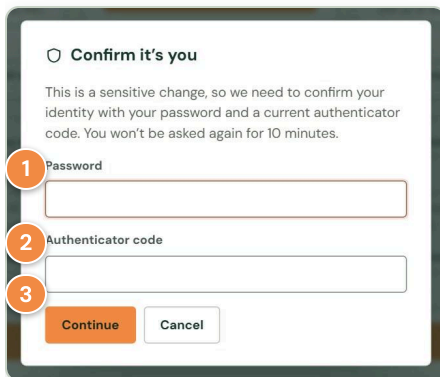
WORDS TO KNOW

Remembered browser

A browser you told Roadside to remember by ticking *Remember this browser*. It skips the six-digit code, and only that. Your password is still asked every time.

A remembered browser stops being remembered 30 days after you ticked the box, and sooner if you change your password, someone resets your two-step sign-in, or someone changes your role. Do not tick the box on a shared counter computer. If a computer goes missing, press **Forget all remembered browsers** on My account.

Roadside also asks you to prove it is you before sensitive changes, such as new recovery codes or inviting someone. A box called **Confirm it's you** opens and asks for your password and a current code. After that you will not be asked again for 10 minutes. Signing in with a code counts. Signing in on a remembered browser does not.



- 1 Your password.
- 2 A current code from your authenticator app.
- 3 Continue sends the change on its way.

The **Confirm it's you** box.

If you forget your password

You can fix this yourself, with the email address you sign in with.

Forgot your password?

Enter the email you sign in with and we'll send you a link to choose a new password.

1 Email

2

3 Send reset link

[Back to sign in](#)

- 1 The email you sign in with.
- 2 Press Send reset link.
- 3 Back to the sign-in page.

Asking for a reset link.

Choose a new password

1 New password

2

Use 14 or more characters. A passphrase of four or five unrelated words works well.

3 Confirm password

4

Save password

Saving signs you out everywhere. Your two-factor settings stay the same.

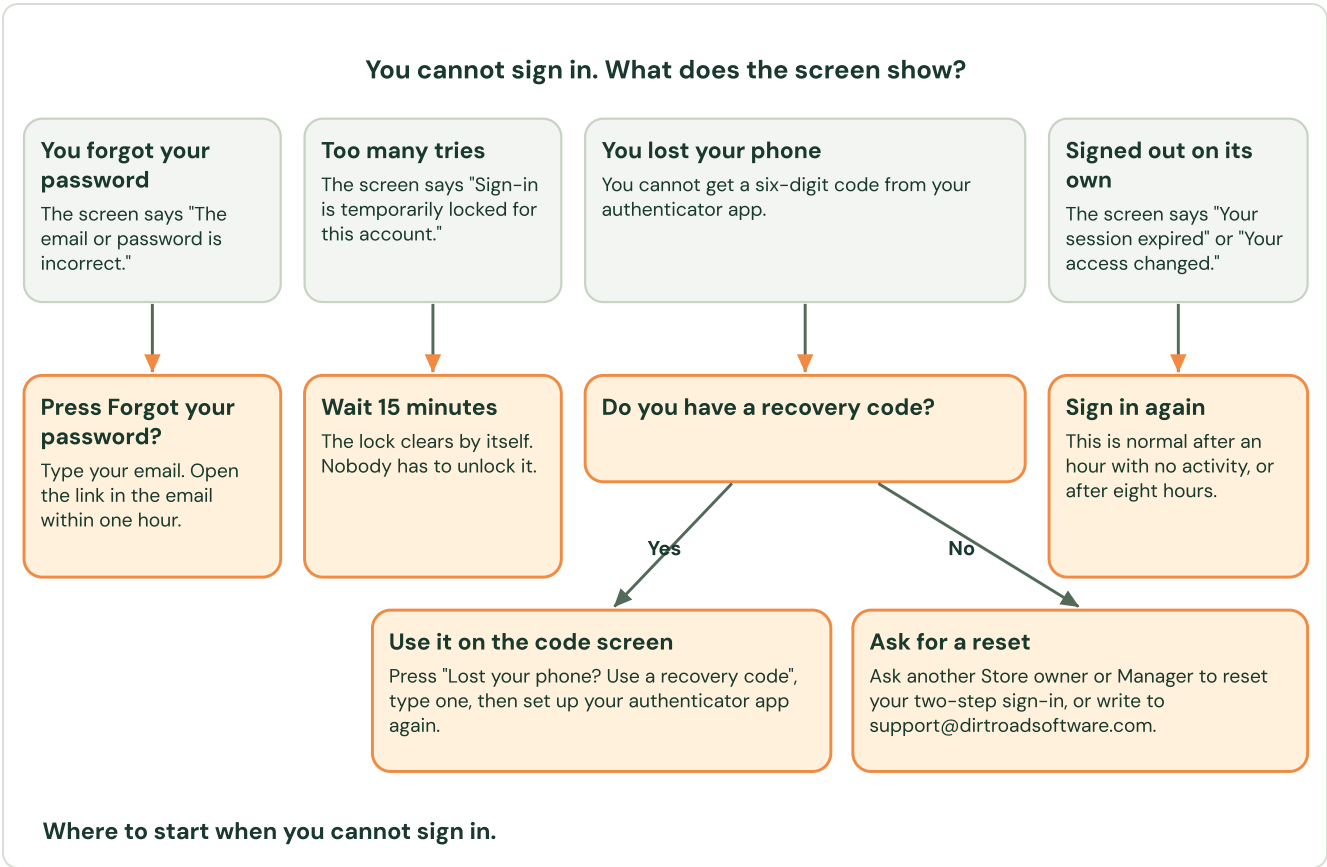
- 1 The new password.
- 2 The rule again.
- 3 Type it again.
- 4 Press Save password.

Choosing a new password.

- 1 On the sign-in page press **Forgot your password?**
- 2 **Type your email** and press **Send reset link**. The page gives the same answer whether or not the address belongs to anyone: *If that address belongs to an account, a reset link is on its way. It expires in one hour. Check your spam folder if you don't see it in a few minutes.*
- 3 **Open the email** titled *Reset your Dirt Road Software password* and press its link. It works once and lasts one hour. Asking again replaces the earlier link.
- 4 **Choose a new password** twice and press **Save password**. This signs you out everywhere. Sign in with the new password. Your two-step sign-in stays set up.

You can ask for a link 3 times an hour for one address. Past that, Roadside says *Too many requests. Please wait a while and try again.* If the email never comes, a Store owner or Manager on your team can make a reset link for you (Help a team member who is locked out, in Chapter 26 (page 216)).

If you are locked out or lose your phone



THE SCREEN SAYS	WHAT TO DO
The email or password is incorrect.	Roadside never says which part is wrong. Check the email and the capital letters, or use <i>Forgot your password?</i>
Sign-in is temporarily locked for this account. Please wait 15 minutes.	The address has been tried more than 10 times in 15 minutes, right or wrong. Wait. The lock clears by itself, and nobody at Dirt Road has to do anything.
Too many attempts. Please wait five minutes.	Ten wrong codes in 5 minutes. Wait, then try the next code.
Too many requests. Please wait 15 minutes and try again.	Many people on one internet connection sent forms at once, such as a busy counter network. Wait.
No workspace yet	Your access has been turned off. Ask your Store owner or Manager.
This link is invalid, expired or already used.	The link has been used, replaced or has run out. The screen adds <i>Ask your administrator for a new one</i> . In your store that means a Store owner or Manager for an invitation, or <i>Forgot your password?</i> for a password reset.

When you lose your phone

- 1 On the code screen press **Lost your phone? Use a recovery code.**
- 2 Type one of your ten codes and press **Use recovery code.** That code is used up.
- 3 Set up your authenticator app again on the new phone, as in the steps near the top of this chapter. Roadside says *Recovery code accepted. Set up your authenticator again to continue. Other sessions were signed out.* It then shows ten new recovery codes. Save them.

With no phone and no recovery codes, ask another Store owner or Manager on your team to press **Reset two-factor** on your page. You set up the app again at your next sign-in. If nobody else can, write to support@dirtyroadsoftware.com.

Google and Microsoft sign-in

If Dirt Road has turned them on for your store, the sign-in page also shows **Continue with Google** and **Continue with Microsoft**. You cannot switch them on yourself. They work only for a person who already has a Roadside account under the same email, and Roadside usually still asks for its six-digit code. You connect or disconnect an account on My account, in the **Google & Microsoft sign-in** card, and Microsoft has to be connected there once before its button works. If the page says *We couldn't find an account for that Google sign-in*, nobody has invited that email to Roadside yet.

How long you stay signed in

Roadside signs you out after an hour with no activity, and after 8 hours in total however busy you are. Opening a page or using search counts as activity. The sign-in page then says *Your session expired. Please sign in again.* If someone changed your role or password, it says *Your access changed. Please sign in again.* A sign-in left half done, between the password and the code, ends after 10 minutes. Press **Sign out** at the bottom of the menu whenever you leave a shared computer.

Quick answers

The questions owners ask most, with the short answer and the chapter that has the detail.

I saved a change, but my website still shows the old one.

Most changes reach the website a few minutes after you save, not at once. The Store sign is faster, about a minute. Wait a few minutes, then reload the page. If it is still old, look at the Publishing tile on Website home: it says whether the website is up to date, whether publishing is paused, or whether the last update stopped. See Chapter 8, How your changes reach the website (page 49).

The website says we are closed, and we are open.

The open or closed line comes from your hours and your closed days. Open Store info and check that today's box is ticked Open, that the times are right, and that today is not listed under Closed days. The times are in your store's time zone. See Chapter 3, Hours, closed days and contact details (page 18).

A customer says they cannot find a product online.

A product shows on the website only when it is not archived, its status is For sale, its Website setting is On the website or In the store only, and its department is set to show in the online store. Check each of those on the product's screen. See Chapter 10, Add or edit a product (page 66) and Chapter 9, Finding your way around products (page 58).

A product shows as out of stock online, and we have it.

The website counts the bags on hand minus any held for a customer who is paying at that moment. Check that the product is set to track stock and that the number on hand is right. A count that is wrong can be fixed by recording a shelf count. See Chapter 13, Stock (page 90).

How do I run a sale?

Roadside has no separate sale price. Change the product's price when the sale starts and change it back when it ends. The website shows only the current price. The product page keeps a price history, so you can see what it was. See Chapter 10, Add or edit a product (page 66).

A screen from this manual is not in my menu.

The menu shows what your role is allowed to use and what your plan includes. Some screens, such as Pricing check and the Assistant, appear only with the matching add-on. See The menu, group by group, in Chapter 1 (page 9) and Chapter 26, Your team and what each role can do (page 211). If you think something is missing, write to support@dirtyroadsoftware.com.

A message from the contact page never reached my email.

Roadside always saves the message in Messages first. The email copy goes to the address on Store info. If that address is empty or wrong, the message shows a Not emailed tag, and you can still read it in Messages. See Chapter 5, Messages and your website assistant (page 31).

An online order came in and I got no email.

New-order emails go to the address in the Email new orders to box in Store settings. If it is empty, no email is sent, and the order still appears in Online orders. See Chapter 17, Store settings (page 118).

I do not see a Refund button on an order.

Store owners and Managers can refund. Staff and Read only people cannot, so ask a Store owner or a Manager to do it. Open the order and look for the Refund button. See Chapter 19, Payments, holds and refunds (page 138).

I want a different photo or new wording on the website.

Photos at the top of pages, paragraphs of wording, new pages and layout are part of the website's design. Send them to Dirt Road as a website change. See Chapter 24, Website changes (page 194).

I forgot my password.

Press Forgot your password? on the sign-in page and type your email. If an account exists for it, a link arrives within a few minutes and works for one hour. See Chapter 27, Signing in safely (page 218).

I lost the phone that gives me my sign-in code.

Use one of your recovery codes on the sign-in code screen. Each code works once. If you saved none, write to support@dirtyroadsoftware.com. See Chapter 27, Signing in safely (page 218).

Someone left the store. How do I take away their access?

Do it the same day. The Store owner opens Admin, then Users, and removes the person or turns them off. A Manager asks the Store owner. See Chapter 26, Your team and what each role can do (page 211).

Why does the website say the store is not taking online orders?

Online ordering has an open or closed switch in Store settings. While it is off, customers read the message you wrote there, or *This store is not taking online orders right now. Please call the store.* A closed day on Store info also stops pickup orders on that date. Check both. See Chapter 17, Store settings (page 118).

My own visits are not in Analytics.

Roadside does not count visits from browsers that send the Global Privacy Control setting, or from search engine robots. Visits from your own computer count when the browser sends neither. Counts for one day are small, so look at a week. See Chapter 23, Analytics (page 180).

Text I typed in brackets stopped my website from updating.

Roadside holds back an update when visible text has a bracketed note that looks like a source, such as (*source: the label*), or a bracketed web address. Remove the brackets and save again. See Chapter 8, How your changes reach the website (page 49).

Glossary

Every word the manual stops to explain, in one list, with the chapter that explains it.

3

301, 302 and 410

The numbers are codes a website sends along with a page, and they tell browsers and search engines what happened to it. Roadside puts them in plain words, and you only choose the words. Chapter 7 (page 45)

7

75th percentile

The speed that 3 visits out of 4 matched or beat. Roadside rates on it so that a few slow visits do not spoil a page's rating. Chapter 23 (page 180)

A

AAFCO statement

The sentence on a label saying the feed meets the nutrient levels set by AAFCO, the Association of American Feed Control Officials. It is often followed by feeding directions. Chapter 12 (page 82)

Account

One customer, business, household or vendor. It holds a name, phone, email, addresses, notes and a number such as A-1009. Chapter 20 (page 146)

Account type

Customer, Prospect, Vendor or Other. A prospect is someone you hope to sell to. A vendor is a company you buy from. Chapter 20 (page 146)

Ag exemption

A farm sales-tax exemption certificate. The customer gives you its number and the date it runs out. Chapter 20 (page 146)

Ag tax exemption

A farm's exemption certificate: its number and the date it expires. Chapter 15 (page 102)

Allowance

The number of website changes your plan includes each month. It starts over on the first of the month. Changes you do not use do not carry over. Chapter 24 (page 194)

Alt text

A sentence that describes a photo for people who cannot see it. Search engines read it too. Chapter 8 (page 49)

As fed and dry matter

As fed means the percentages are measured on the feed as it comes in the bag. Dry matter means they are measured with the water taken out. Use whichever the tag says. Chapter 12 (page 82)

Authenticator app

A free phone app, such as Google Authenticator, Microsoft Authenticator, 1Password or Authy, that shows a new six-digit code every 30 seconds. Chapter 1 (page 6)

B

Barcode

The 8, 12, 13 or 14 digits printed under the bars on the bag. Some call it the UPC. Chapter 11 (page 74)

Bounce

A visit that looked at one page and did nothing on it: no call, form, download or link out. The bounce rate is the share of visits that bounced. A lower bounce rate is better. Chapter 23 (page 180)

C

Campaign

One particular push you made, such as a spring sale or the Chick Days email. A link tagged with a campaign name shows up under that name. Chapter 23 (page 180)

Card processor

The company that handles card payments for your store. Stripe and Clover are two. You have your own account with it, with its own fees and its own dashboard. Dirt Road connects it to Roadside. To add or change one, write to **support@dirtyroadsoftware.com**. Chapter 16 (page 110)

Cart abandonment

Of the visits that added something to the cart, the share that did not buy in that visit. Chapter 23 (page 180)

Category

One of the few big topics your articles cover, such as Poultry or Horses & livestock. Each article has one. Chapter 22 (page 167)

Channel

The kind of place a visit came from. Roadside sorts every visit into one channel, from the first page it opened. *Referral* is one of them: a visit that came from another website that links to yours. Chapter 23 (page 180)

Consent record

What Roadside keeps for each person: the date they agreed, the exact words they agreed to, where it came from, and, if they left, when. It is your proof that they asked for your emails. Chapter 21 (page 156)

Contact

A person on an account, with their own phone and email. Chapter 20 (page 146)

Conversion

A visit that included at least one key event. The conversion rate is the share of visits that did. Chapter 23 (page 180)

Core Web Vitals

Google's three page-speed checks: how fast the main content shows (LCP), how fast the page reacts to a tap (INP), and how much it moves while loading (CLS). Chapter 23 (page 180)

Cost

What you pay for the size. Customers never see it. Chapter 11 (page 74)

Counting (tracking)

Roadside keeps a number for the size. The screens call this *Track stock*. A size you do not count always shows as in stock on the website. Chapter 13 (page 90)

CSV file

A plain spreadsheet file with a row for each person. Excel, Numbers and Google Sheets can save and open it. Chapter 21 (page 156)

D

Department

A category at the top level, such as Feed or Tack. Customers meet departments as the main groups of your shop. Chapter 9 (page 58)

Double opt-in

A sign-up that only counts after the person clicks a link in an email you send them. It keeps out mistyped addresses and addresses someone signed up for another person. The settings screen calls it *Send a confirmation email first*. Chapter 21 (page 156)

E

Engaged visit

A visit that lasted 10 seconds or more with a page showing on the screen, or looked at two pages or more, or included a key event. The engagement rate is the share of visits that were engaged. Chapter 23 (page 180)

G

Guaranteed analysis

The table of nutrients printed on a feed tag: crude protein, crude fat, crude fiber and so on, each with an amount. Chapter 12 (page 82)

H

Hold

Money set aside on a customer's card without taking it. The customer sees it as pending. You can charge the card later for what you have on the shelf, or let the hold go. Chapter 16 (page 110)

I

Invitation link

A private link that lets a new person choose a password and finish setting up their sign-in. It works once and stops working after 7 days. Chapter 26 (page 211)

K

Key event

An action you decided matters, such as someone tapping your phone number or sending the contact form. You choose them in Setup. Chapter 23 (page 180)

L

License

The record Dirt Road keeps of your plan: what it includes and whether it is paid. Two of the status badges below use the word. Chapter 25 (page 202)

Live

What customers see on your website right now. Chapter 8 (page 49)

Low and Out

A size is *Low* when its count is at or under its reorder point, and *Out* when it is at zero or below. Chapter 13 (page 90)

M

Map location

Your store's position on the map, written as two numbers: latitude, then longitude. Google Maps gives you both when you right-click a spot. Chapter 3 (page 18)

Margin

What is left of the price after the cost, as a percent of the price. A \$14.50 bag that costs \$10.40 has a 28% margin. The product page shows it once you have entered a cost. Chapter 11 (page 74)

O

On hand

How many Roadside believes are in the store right now. Chapter 13 (page 90)

P

Page view

One page shown on someone's screen. Going to another page is another page view, and so is flipping to page 2 of a shop list. Chapter 23 (page 180)

Paid through

The date your plan is paid up to. During a trial the same line reads *Trial ends*. Chapter 25 (page 202)

Panel

The set of screens you sign in to. Some people call it the admin panel or the back end. This manual says Roadside, or the panel. Chapter 1 (page 6)

Part number

The maker's own item number for the product, which is not the same as your SKU. Chapter 11 (page 74)

Photo description

A sentence saying what the photo shows. People who use a screen reader hear it, and it shows when a photo does not load. Search engines read it too. Chapter 22 (page 167)

Plan

What Dirt Road provides for your store: Roadside, and how many website changes you get each month. Chapter 25 (page 202)

Product

One thing you sell, with a page of its own on the website. ShowTime 27/20 is one product even though it comes in two bags. Chapter 9 (page 58)

Publish

Roadside rebuilding your website's pages from what you have saved and putting the changed ones on the website. This manual also says *update*. The screens say *publish*. Chapter 8 (page 49)

R

Recovery codes

Ten one-time codes Roadside shows once, for the day your phone is lost or broken. Each works one time. Chapter 27 (page 218)

Redirect

An instruction that sends a visitor from one web address to another. Roadside calls each one an old link. An address here means the part after your website's name, like `/about-us`. Chapter 7 (page 45)

Remembered browser

A browser you told Roadside to remember by ticking *Remember this browser*. It skips the six-digit code, and only that. Your password is still asked every time. Chapter 27 (page 218)

Reorder point

The number at or under which you want to be reminded to reorder. You choose it for each size. Chapter 13 (page 90)

Restricted-use license

A state license a customer needs to buy restricted-use pesticides. Chapter 20 (page 146)

Restricted-use pesticide license

The applicator license a buyer needs for restricted-use pesticides: its number and expiry date. Chapter 15 (page 102)

Role

A job title inside Roadside that decides which screens and buttons a person gets. Each person has one role in your store. Chapter 26 (page 211)

S

Size

One way a product is sold: a 50 lb bag, a 20 lb bag, a gallon jug. Each size has its own price and its own count on the shelf. A product sold only one way has one size, and customers never see a choice. Chapter 9 (page 58)

SKU

Your own item number for a size. Leave it empty on a new product and Roadside makes one for you. Chapter 9 (page 58)

Structured data

Facts about your store and each product, such as your address, hours and prices, written so that search engines and AI assistants can read them. Chapter 8 (page 49)

Subcategory

A category inside a department, such as Poultry or Horse inside Feed. Chapter 9 (page 58)

T

Tag

A short word you add to an account, such as *chick days* or *delivery*, so you can find that whole group later with the search box. Chapter 20 (page 146)

Test order

An order paid through a practice card processor, marked **TEST**. No real money moves. If you find one, cancel it with **Cancel test order**, which puts the stock back. Chapter 18 (page 128)

Two-step sign-in

After your password, you type a six-digit number from an app on your phone. Someone who finds your password still cannot get in without your phone. The sign-in screen calls this *two-factor*. Chapter 1 (page 6)

V

Veterinary Feed Directive (VFD)

A vet's written order that a farm needs before it can buy medicated feed. Roadside records the vet's name and the date the directive ends. Chapter 15 (page 102)

VFD

Veterinary Feed Directive. A written order from a veterinarian that a customer needs before you can sell certain medicated feed. Chapter 20 (page 146)

Visit

One person's time on your website, however many pages they look at. If one person opens six pages in a row, that is one visit. Chapter 1 (page 6)

Visitor

One browser on one day. Someone who visits on three different days counts as three visitors, because Roadside does not follow people from day to day. Chapter 23 (page 180)

W

Website change

A request you send to Dirt Road for a change to your website that you cannot make yourself. It has a number, a status and a thread of notes between you and Dirt Road. Chapter 24 (page 194)

Website day

A day Dirt Road sets aside to work on website changes. A new request waits for the next one. Chapter 24 (page 194)

Workspace

Your store's own private space inside Roadside, with its own people, products and messages. Nobody from another store can see yours. The name of yours sits at the top of the menu. Chapter 1 (page 6)

Where to find each screen

Every screen in the panel, with where it lives in the menu and the chapter that explains it. Your menu shows the ones your role and plan include.

SCREEN	WHERE IN THE MENU	CHAPTER
Account	Website > Account	Chapter 25, Account and Billing (page 202)
Accounts (customers)	Customers > Accounts	Chapter 20, Customer accounts and contacts (page 146)
Analytics	Website > Analytics	Chapter 23, Analytics (page 180)
Articles	Website > Articles	Chapter 22, Articles (page 167)
Assistant	Customers > Assistant	Chapter 5, Messages and your website assistant (page 31)
Billing	Website > Billing	Chapter 25, Account and Billing (page 202)
Brands	Inventory > Brands	Chapter 9, Finding your way around products (page 58)
Categories (departments)	Inventory > Categories	Chapter 9, Finding your way around products (page 58)
Compliance watch	Feed & Seed > Compliance watch	Chapter 15, Compliance watch and Pricing check (page 102)
Contacts	Customers > Contacts	Chapter 20, Customer accounts and contacts (page 146)
Dashboard	Workspace > Dashboard	Chapter 1, Meet your panel (page 6)
Email list	Customers > Email list	Chapter 21, The email list (page 156)
Import products	Inventory > Products, then Import	Chapter 14, Importing and exporting products (page 97)
Messages	Customers > Messages	Chapter 5, Messages and your website assistant (page 31)
My account	Your name at the bottom of the menu	Chapter 27, Signing in safely (page 218)
Old links	Website > Old links	Chapter 7, Old links (page 45)

SCREEN	WHERE IN THE MENU	CHAPTER
Online orders	Online store > Online orders	Chapter 18, Working the orders (page 128)
Pricing check	Inventory > Pricing check	Chapter 15, Compliance watch and Pricing check (page 102)
Products	Inventory > Products	Chapter 9, Finding your way around products (page 58)
Questions & answers	Website > Questions & answers	Chapter 6, Reviews, and questions and answers (page 39)
Reviews	Website > Reviews	Chapter 6, Reviews, and questions and answers (page 39)
SEO articles	Website > SEO articles	Chapter 22, Articles (page 167)
Store info	Website > Store info	Chapter 3, Hours, closed days and contact details (page 18)
Store settings	Online store > Store settings	Chapter 17, Store settings (page 118)
Store sign	Website > Store sign	Chapter 4, The sign at the top of your website (page 25)
Website changes	Website > Website changes	Chapter 24, Website changes (page 194)
Website home	Website > Website home	Chapter 1, Meet your panel (page 6)



ROADSIDE
— BY DIRT ROAD SOFTWARE —

Questions about Roadside?

Write to us and tell us which screen you were on and what you were trying to do. A picture of the screen helps.

support@dirtyroadsoftware.com

dirtyroadsoftware.com