



Clipboard

Clipboard helps you easily you gather all the prospects you want to visit from different modules and views to create a route to visit.

1. Select the records you want to visit in the list view or using the lasso tool.
2. Click add to clipboard under the more option in the list view.



All Leads

None

1 - 25

List of Leads

(2)

Anusha
Traditional Marketing • Contact in Future

Bhavana
Trade Show • Not Qualified

Suman
Paid Social • Contacted

Lakshmi
Traditional Marketing • Contact in Future

Karthik
Digital Marketing • Lost Lead

Meera
Partners • Not Contacted

Nisha
Trade Show • Junk Lead

Arun
Paid Social • Qualified

Mythili
Traditional Marketing • Qualified

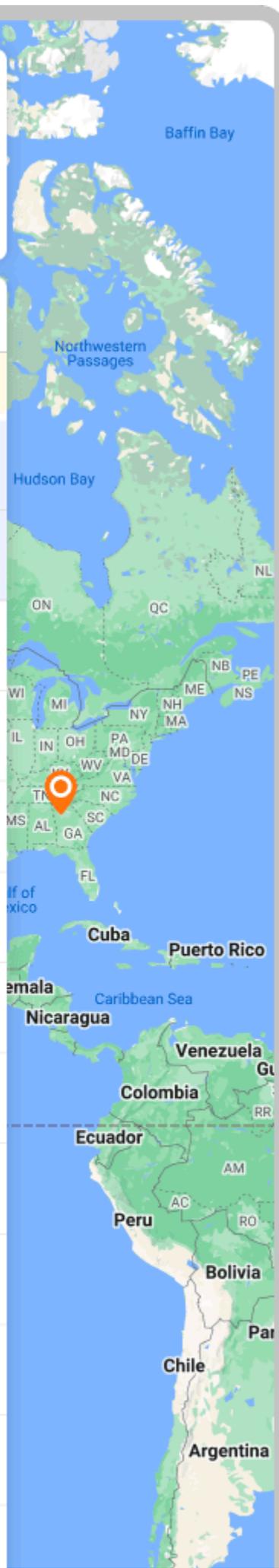
Praveen
Digital Marketing • Contacted

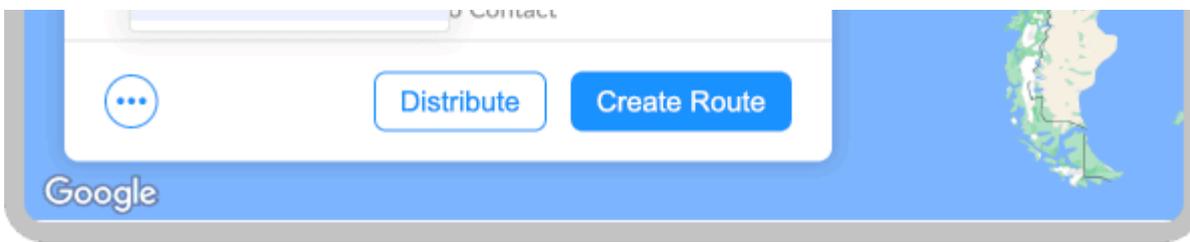
Prakash
Partners • Qualified

Vimala
Trade Show • Qualified

Add to Existing Route

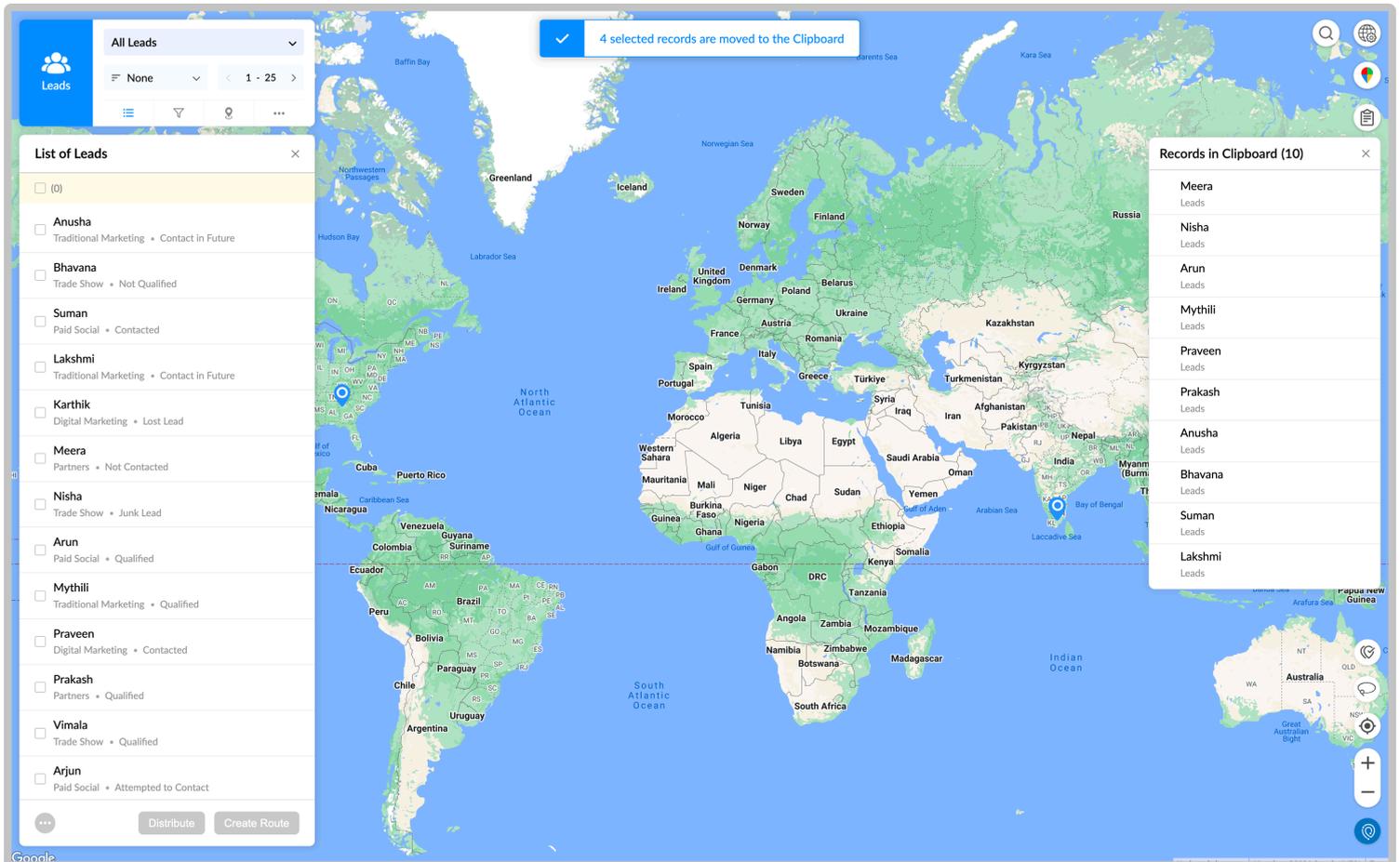
Add to Clipboard





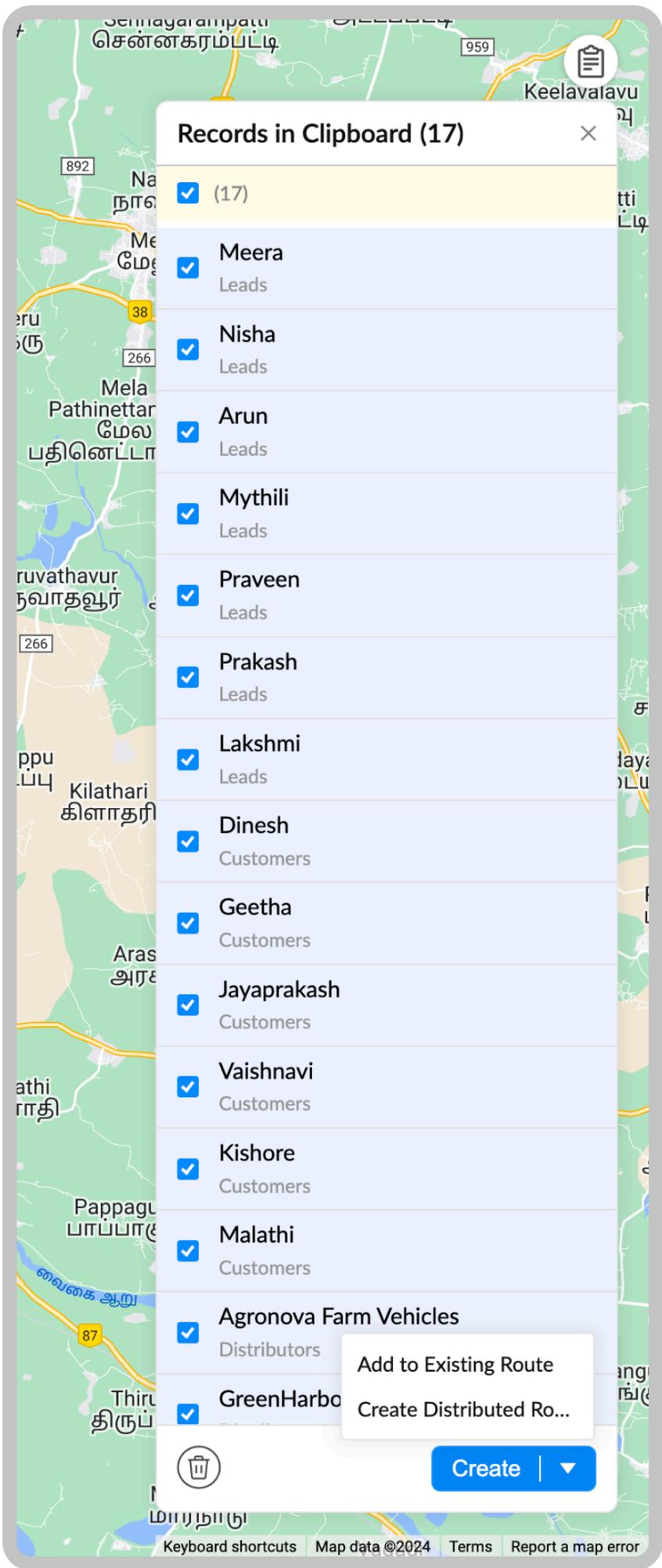
3. As you add records to the clipboard, they will appear in it.

4. Now, you can switch views or modules to select the next bunch of records.



5. Once, you have gathered all the records.

- a. You can select the records you want to create either
 - i. Create a individual route
 - ii. Add the stops to an existing route
 - iii. Create a distributed route.



Records in Clipboard (17)

- (17)
- Meera
Leads
- Nisha
Leads
- Arun
Leads
- Mythili
Leads
- Praveen
Leads
- Prakash
Leads
- Lakshmi
Leads
- Dinesh
Customers
- Geetha
Customers
- Jayaprakash
Customers
- Vaishnavi
Customers
- Kishore
Customers
- Malathi
Customers
- Agronova Farm Vehicles
Distributors
- GreenHarbo
Distributors

Add to Existing Route
Create Distributed Ro...

Create | ▾

b. You also can remove the records you don't want to create a route.

Records in Clipboard (17)

(1)

Meera
Leads

Nisha
Leads

Arun
Leads

Mythili
Leads

Praveen
Leads

Prakash
Leads

Lakshmi
Leads

Dinesh
Customers

Geetha
Customers

Jayaprakash
Customers

Vaishnavi
Customers

Kishore
Customers

Malathi
Customers

Agronova Farm Vehicles
Distributors

Remove from Clipboard



Create | ▼

