



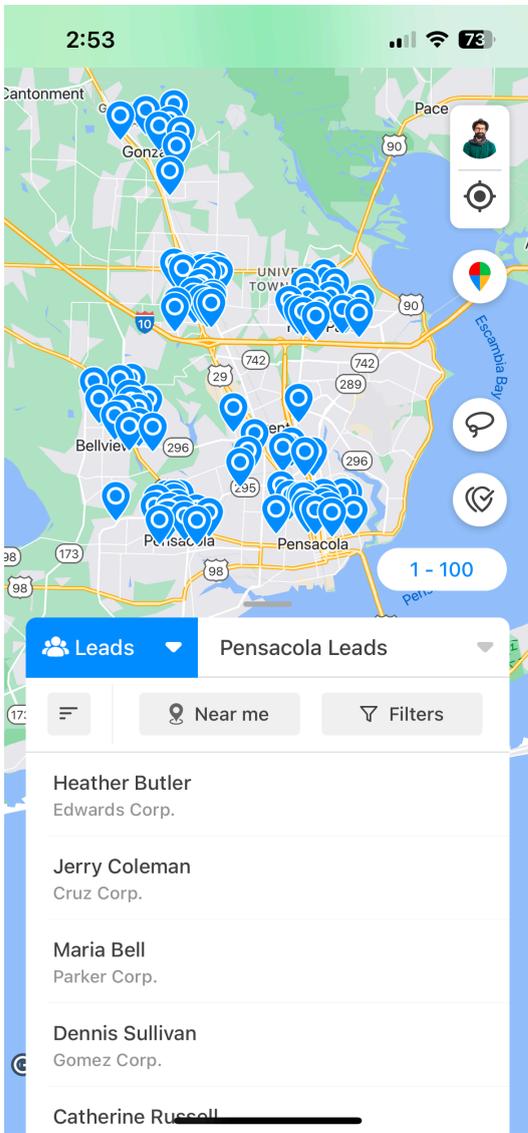
Color Views - Mobile

The Color View allows users to visualize their CRM data on a map as different colored pins based on the criteria they apply. This feature is useful for organizing and identifying different types of records based on specific characteristics.

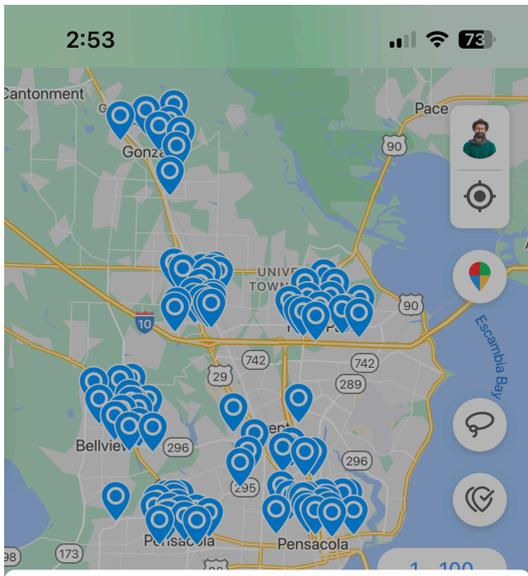
i Note: This feature is only available in the Professional plan. Color views need to be created on the web to viewed on the mobile.

Viewing Color Views

1. Tap the color view icon to open the color view menu.



2. Select from the list provided in the table below:



Select a Color View

Search

Created By Me

Public Color Views

Other User's

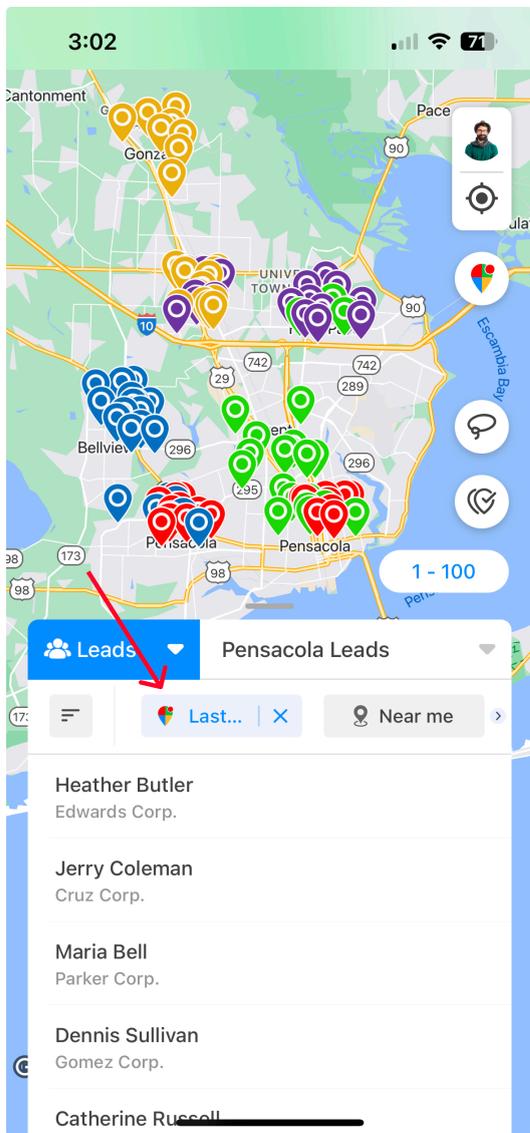
Last Visited Date

Lead by Source

Leads by Title

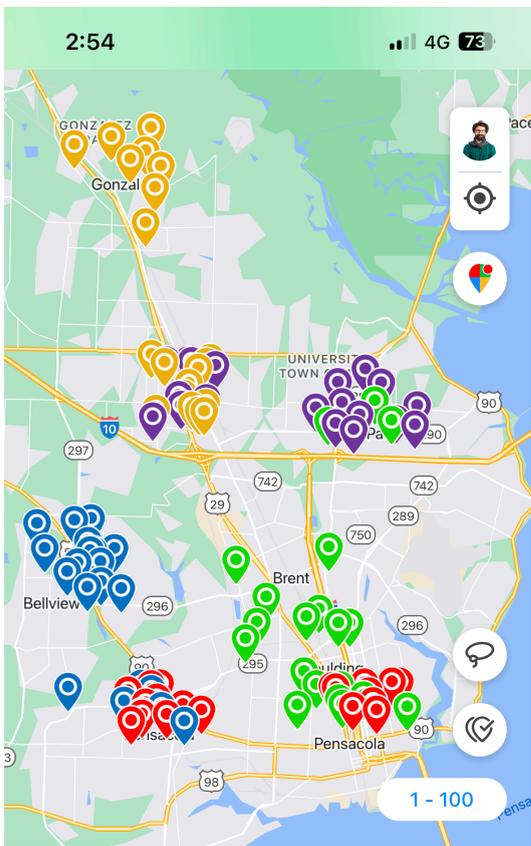
Category Name	Color View Contained
Created By Me	Color views you created
Public Color View	Color views shared with everyone
Other User's Color View	Color views created by other users (viewable only by admins)

Once selected, all the pins on the map will be color coded according to the chosen color view.



3. The color view legend can be viewed by tapping the color view name in the sub menu in RouteIQ widget.

- You can select the criteria you want to view by checking the checkbox beside it. These pins will be hidden in the map and list view.



- LAST VISIT DATE
- 01 May 2023... (20) 01 Apr 2023... (20)
- 01 Jul 2023... (20) 01 Aug 2023... (20)
- 01 Jun 2023... (20)

4. To remove the applied color view, tap the close icon beside the color view name in the sub menu.