

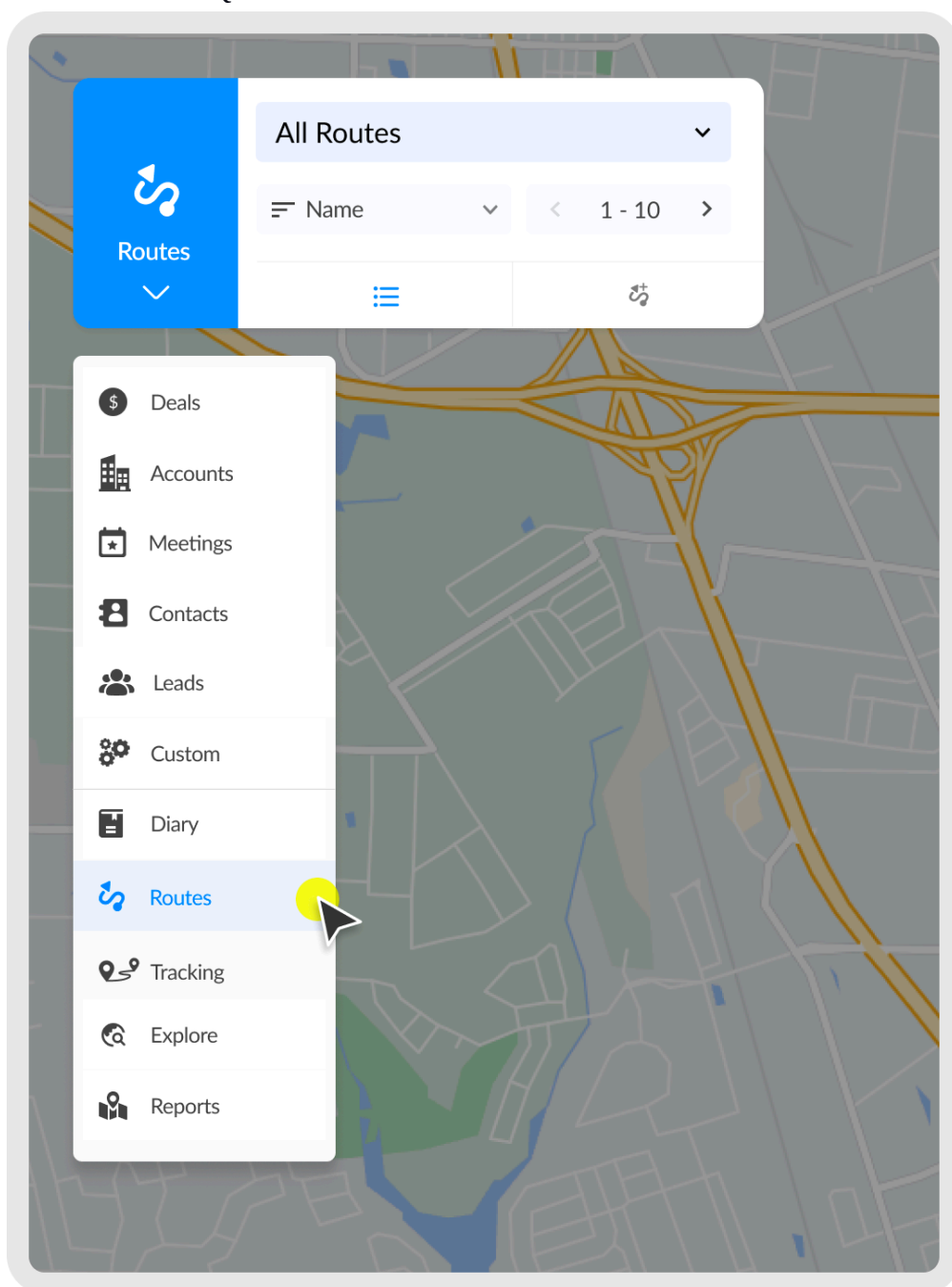


Creating Routes

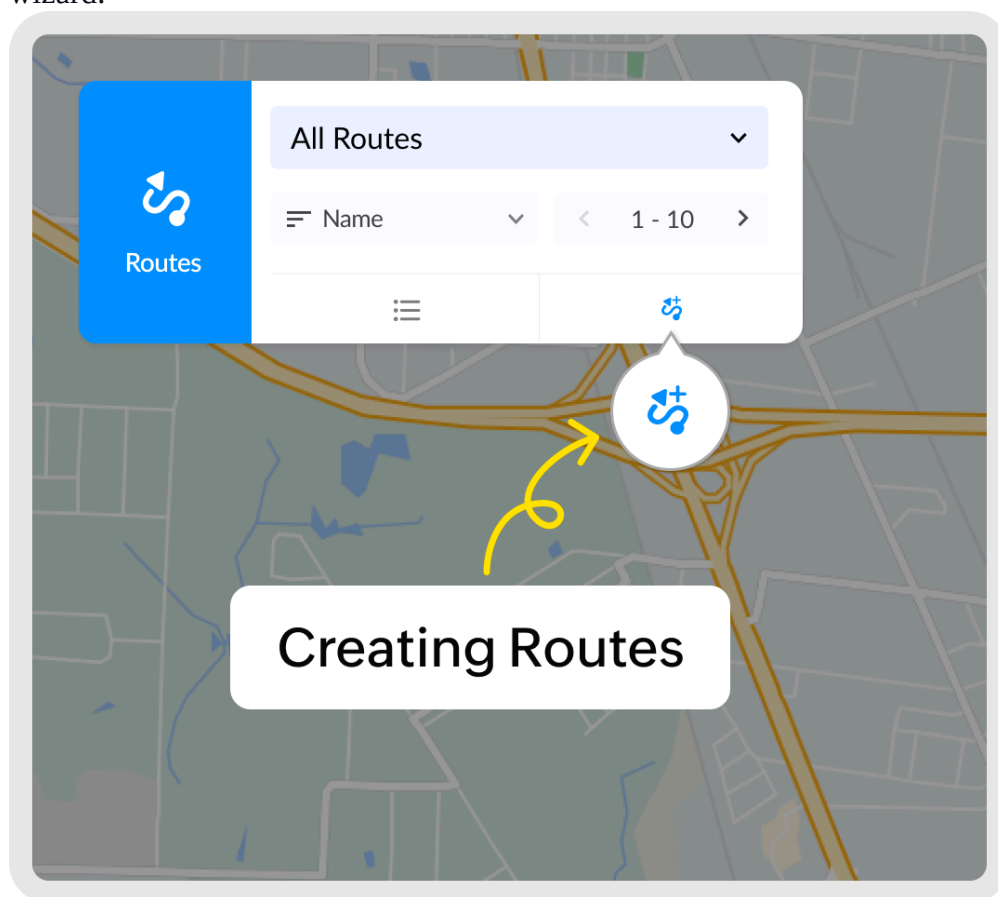
The *Route Planning* feature in RouteIQ helps you organize and plan your customer visits for your sales, service, or delivery activities. You can plan routes, modify them on the go, and make the most of your time.

Route Planning Wizard

1. Go to the *RouteIQ* window and choose the Routes Module from the Module dropdown.



2. Click on the **create new route icon**, which is located near the *filter button*. This will open the route planner wizard.



3. You can change the name of the route in the Route Name field.
4. Provide the starting date and time of the journey under the *Start Time field*.

Create Route

Route Name*

Owner: [Myrtle Welch](#)

New Leads - Visits

Route Type

Flexible Timing



Start Time

29 Jun., 09:30 AM



Itinerary

(4 Appointments - 1 h 30 min)

[+ Breaks](#)

Home

Start

09:30 PM

New Gen Agent

Lead

30 mins



Cotton Textiles

Lead

30 mins



Morgan Dealers

Lead

30 mins



Mathew Gas Agent

Lead

30 mins



[+ Add Stop](#)


Home

End

Cancel

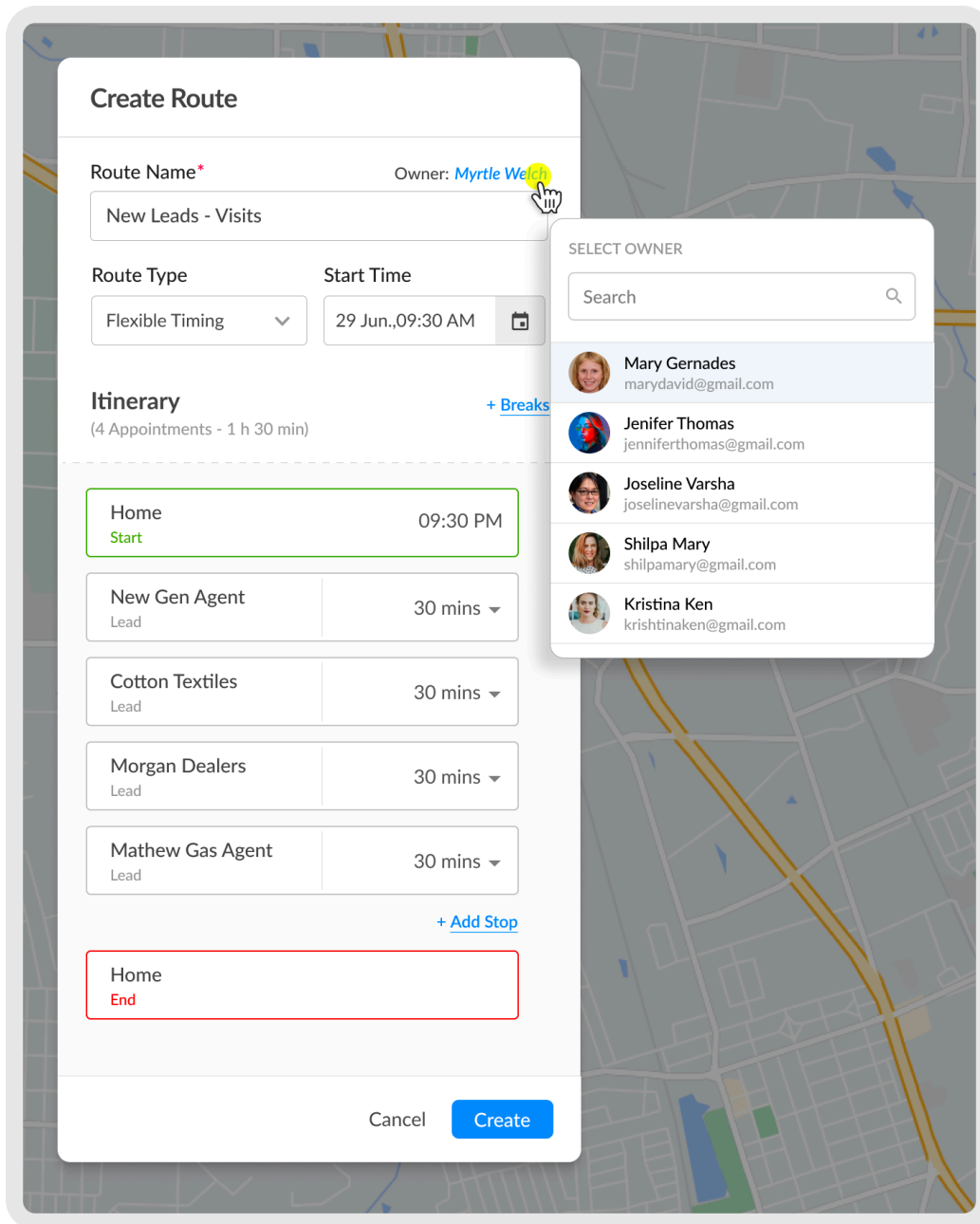
Create

❗ **Limitation:** RouteIQ Professional edition supports up to 50 stops, including start and end points, while the Standard edition supports up to 25 stops.

 **Note:** The route path for completed routes will be available for 1 month after the route completion date.

Assigning Routes

1. Click the **route owner's name** beside the route name.
2. Select the user to whom you want to assign the route.



The screenshot shows the 'Create Route' form with a map background. The form includes fields for 'Route Name' (New Leads - Visits), 'Route Type' (Flexible Timing), 'Start Time' (29 Jun., 09:30 AM), and 'Itinerary' (4 Appointments - 1 h 30 min). The 'Itinerary' section lists stops: Home (Start, 09:30 PM), New Gen Agent (Lead, 30 mins), Cotton Textiles (Lead, 30 mins), Morgan Dealers (Lead, 30 mins), and Mathew Gas Agent (Lead, 30 mins). A '+ Add Stop' button is at the bottom of the itinerary. A 'SELECT OWNER' dropdown menu is open, showing a search bar and a list of users: Mary Gernades, Jenifer Thomas, Joseline Varsha, Shilpa Mary, and Kristina Ken. The 'Owner' field in the form is currently set to 'Myrtle Welch'.

Create Route

Route Name* Owner: Myrtle Welch

New Leads - Visits

Route Type Flexible Timing Start Time 29 Jun., 09:30 AM

Itinerary + Breaks
(4 Appointments - 1 h 30 min)

Home Start	09:30 PM
New Gen Agent Lead	30 mins
Cotton Textiles Lead	30 mins
Morgan Dealers Lead	30 mins
Mathew Gas Agent Lead	30 mins

[+ Add Stop](#)

Home
End

[Cancel](#) [Create](#)

Route type

RouteIQ offers two types of timings for routes: *scheduled* and *flexible*.

Create Route

Route Name* Owner: [Myrtle Welch](#)

New Dennis - Leads

Route Type Start Time

Flexible Timing 29 Jun., 09:30 AM

Flexible Timing

Schedule Timing

[+ Breaks](#)

Home 09:30 PM

Start

New Gen Agent 30 mins ▼

Lead

Cotton Textiles 30 mins ▼

Lead

Morgan Dealers 30 mins ▼

Lead

Mathew Gas Agent 30 mins ▼

Lead

[+ Add Stop](#)

Home

End

Cancel Create

- **Scheduled Timing** - Create routes by providing fixed timings for the meetings. The order of stops is sorted based on the start time of the meetings with ETAs & ETDs.
- **Flexible Timing** - Create routes by providing just the duration of the meeting. The order of stops is optimized to travel the least distance/duration.

You can choose between scheduled timing and flexible timing by clicking on the **route type dropdown** and choosing the relevant option.

Itinerary

The number of appointments and the duration of the journey is displayed on the top.

Create Route

Route Name*

New Leads - Visits

Owner: Myrtle Welch

Route Type

Flexible Timing

Start Time

29 Jun.,09:30 AM

Itinerary

(4 Appointments - 1 h 30 min)

+ Breaks

Home

Start

09:30 PM

New Gen Agent

Lead

30 mins

Cotton Textiles

Lead

30 mins

Morgan Dealers

Lead

30 mins

Mathew Gas Agent

Lead

30 mins

+ Add Stop

Home

End

Cancel

Create

Adding Start and end location

You can click on the **select start point field** and provide the start point, choosing either a stop as the location or a favorite place. You can follow the same steps to add the end point.

Note:

- For scheduled timing, the start and end points are optional.
- For flexible timing, both start and end points must be provided.

Adding stops to your route

Create Route

Route Name* Owner: [Myrtle Welch](#)

New Leads - Visits

Route Type Start Time

Flexible Timing 29 Jun., 09:30 AM

Itinerary + [Breaks](#)

(4 Appointments - 1 h 30 min)

Cotton Textiles Lead	30 mins ▼
Morgan Dealers Lead	30 mins ▼
Mathew Gas Agent Lead	30 mins ▼

Q Search start point

APPOINTMENT DURATION

45 Mins ▼

Cancel Add

Home
End

Cancel Create

1. Click on the **Add stops button** below the starting point field to add stops.
2. Click on the **module dropdown** to view the list of all modules.
3. Click on the desired module.
4. Search and select the desired record in the search box beside the module dropdown.
5. For flexible timing, provide the appointment duration or timing.
For scheduled timing, provide the *from* and *to* timing for the appointment.
6. Click **Add** to add the record to the route wizard.

7. Repeat the process to add all the required records.
8. Click on **Create** to create the route.

Note: The timing of a scheduled stop from the meetings module is fetched from Zoho CRM. If you modify the appointment timing in RouteIQ, the change will be updated in Zoho CRM.

Note: Within a day, multiple stops for a record can be set only for *scheduled type* routes and isn't supported for records from the meetings module.

Rearranging stops

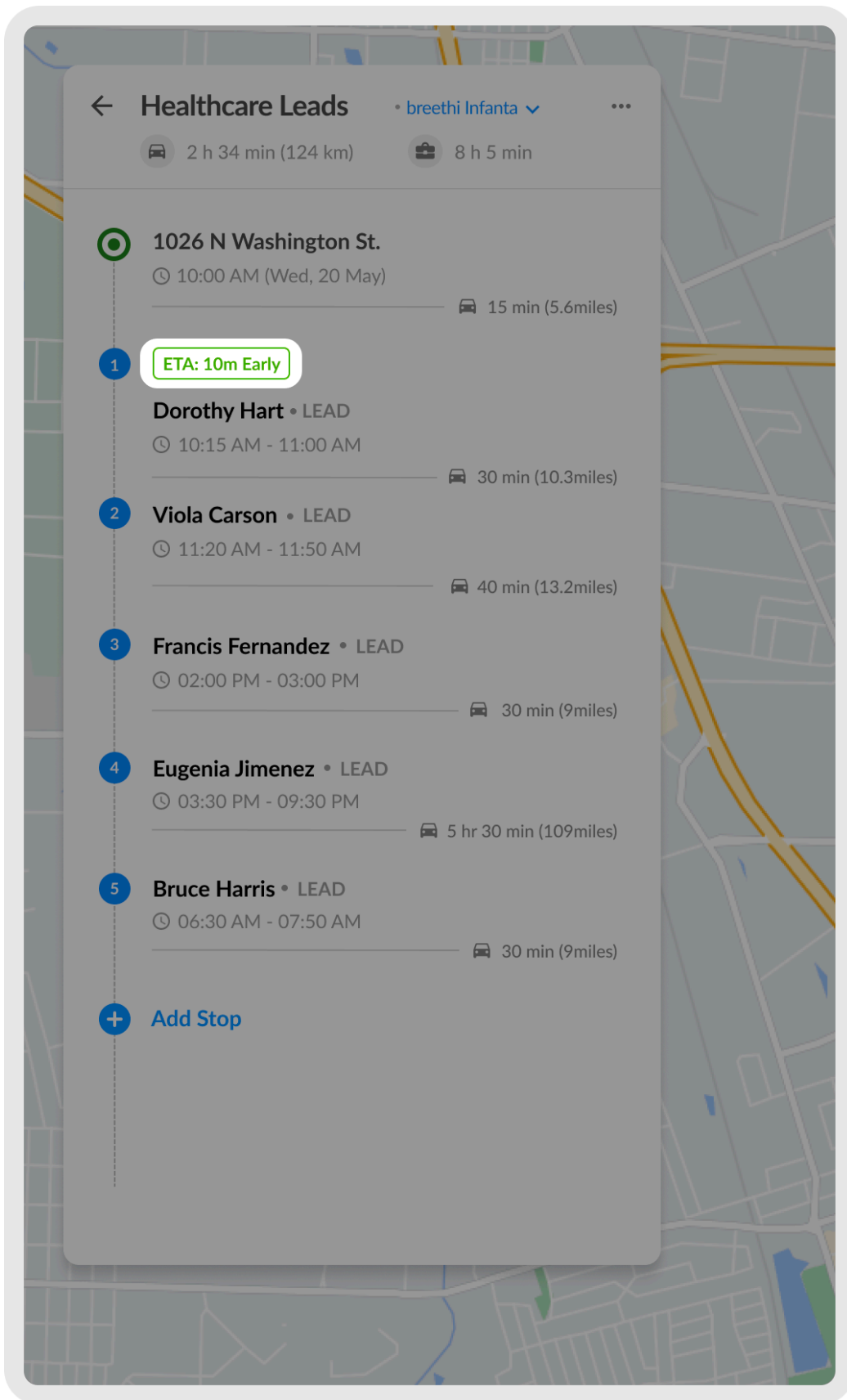
1. Click and drag the **three-line icon** that appears when you hover over the stop.
2. Drop the stops to the required position.

Note: The optimization is removed when the stop's position is manually changed.

Route Optimization

- RouteIQ optimizes your routes by rearranging the stops to create the shortest possible route which help you minimize your travel and duration.
- Route optimization is applied for route with flexible timing (stops without fixed timing)

Estimated Time of Arrival & Departure



- **Coordinate sales visits with customers:** Plan sales visits around your schedule to make sure all your meetings can be visited on time.
- **Ensure timely arrivals and departures:** Stay on time while en route with the estimated arrival and departure time (ETAs & ETDs).