Zoho Corporation

Creating Zoho CRM Meeting for Routes and Stops
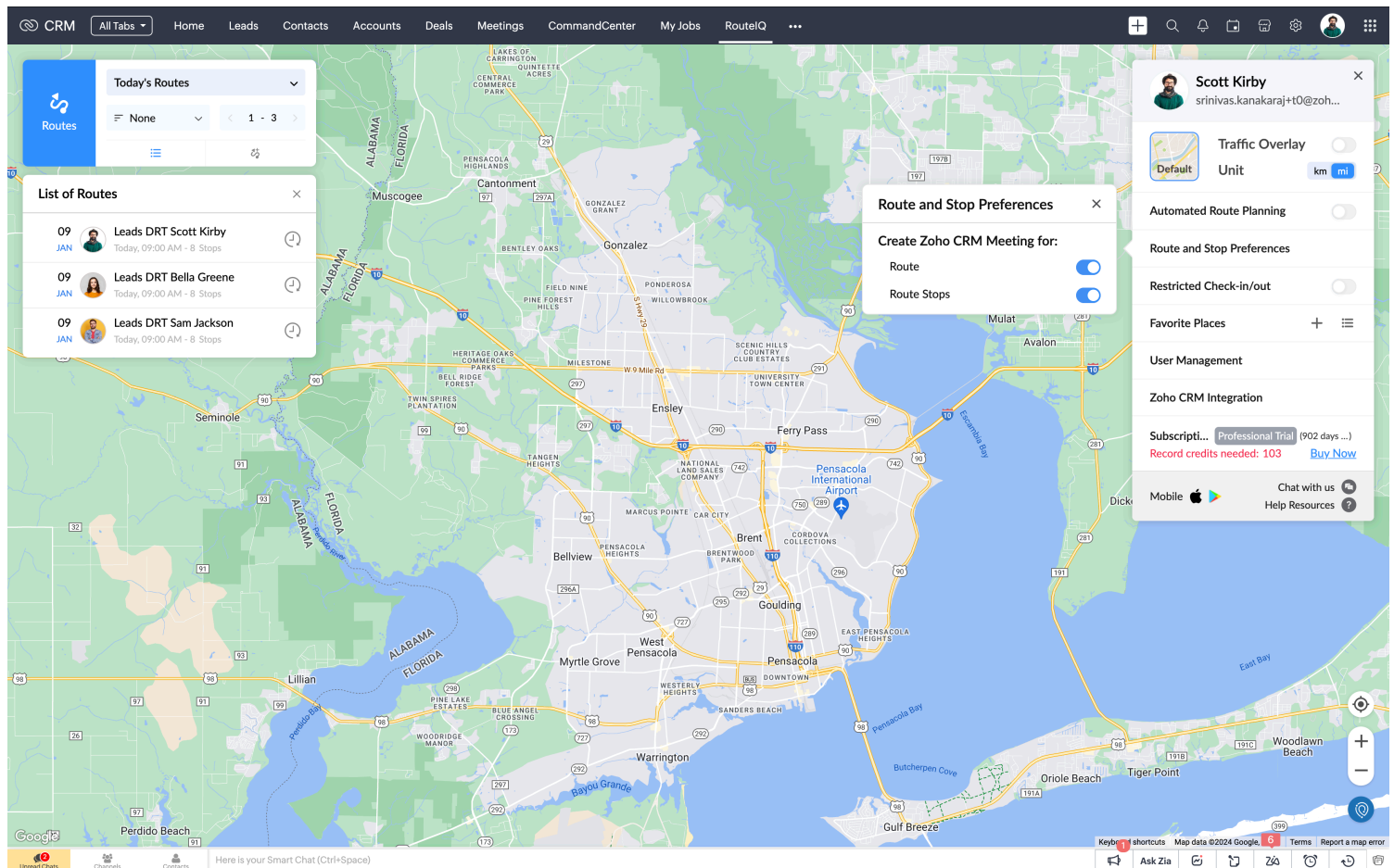
RouteIQ can automatically create meetings in Zoho CRM for routes and stops when created in RouteIQ and view them in your calendar. With this, you can block the time when you will be visiting customers or traveling to prevent overlapping in planning other meetings.

Enable Zoho CRM Meetings for Routes and Stops

1. Open the RouteIQ settings menu
2. Click on Route and Stop Preferences
3. Here you can select between routes, route stops or both.

How are the meetings shown in Zoho CRM?

1. In the Meetings module

2. In the Zoho CRM Calendar

List View

Routes   **Stops**

	Title All ▾	≡	From *	≡	To	≡	Related To	
☐	RIQ_RT - Leads DRT Scott Kirby		Jan 2, 2024 09:00 AM		Jan 2, 2024 05:31 PM			
☐	1. Amy Rogers - Leads DRT Scott Kirby - RIQ_ST		Jan 2, 2024 09:08 AM		Jan 2, 2024 10:08 AM		⊙ᵅ Amy Rogers	
☐	2. Anna Bailey - Leads DRT Scott Kirby - RIQ_ST		Jan 2, 2024 10:10 AM		Jan 2, 2024 11:10 AM		⊙ᵅ Anna Bailey	
☐	3. Jacob Morales - Leads DRT Scott Kirby - RIQ_ST		Jan 2, 2024 11:12 AM		Jan 2, 2024 12:12 PM		⊙ᵅ Jacob Morales	
☐	4. Ryan Stewart - Leads DRT Scott Kirby - RIQ_ST		Jan 2, 2024 12:14 PM		Jan 2, 2024 01:14 PM		⊙ᵅ Ryan Stewart	
☐	5. Gary Cook - Leads DRT Scott Kirby - RIQ_ST		Jan 2, 2024 01:18 PM		Jan 2, 2024 02:18 PM		⊙ᵅ Gary Cook	
☐	6. Cynthia Morris - Leads DRT Scott Kirby - RIQ_ST		Jan 2, 2024 02:20 PM		Jan 2, 2024 03:20 PM		⊙ᵅ Cynthia Morris	
✎ ☐	7. Angela Ortiz - Leads DRT Scott Kirby - RIQ_ST		Jan 2, 2024 03:22 PM		Jan 2, 2024 04:22 PM		⊙ᵅ Angela Ortiz	
☐	8. Eric Morgan - Leads DRT Scott Kirby - RIQ_ST		Jan 2, 2024 04:31 PM		Jan 2, 2024 05:31 PM		⊙ᵅ Eric Morgan	

ⓘ The meeting record for the route has naming format: "RIQ_RT" + route name

The meeting record for the stops has the naming format: **stop position + record name + route name + "RIQ_ST"**

💡 Custom views and filter can be created for routes with starts with criteria "RIQ_RT" and for stops by using ends with "RIQ_ST"

Calendar View

Single user week view

My Meetings,Calls and Appointme... ▾   Day Week Month   Create Options ▾

December 18 - 24, 2023   ‹ Today ›

	18 Monday	19 Tuesday	20 Wednesday	21 Thursday	22 Friday	23 Saturday	24 Sunday

8am

9am   RIQ_RT - Leads ...   RIQ_RT - Leads ...   1. Stephanie G...   RIQ_RT - Leads ...   1. Kathleen Mur...   RIQ_RT - ...   1. Mellisa... 1. Mellisa...
             9 am - 4:28 pm   9 am - 2:18 pm   2. Dorothy Mitc...   9 am - 1:16 pm   2. Stephen Ree...   9 am   2. Steph... 2. Steph...

10am   3. Kimberly Wri...   3. Laura Diaz - L...   3. Dorot... 3. Dorot...
                                                        4. Steven King ...   4. Kimbe... 4. Kimbe...

11am   5. Carol Baker - ...   4. Kenneth Ada...   5. Brian ... 5. Brian ...
                                                        6. Kenneth Ada...   5. Carol Baker - ...   6. Steve... 6. Steve...

12pm   7. Kathleen Mur...   6. Dorothy Mitc...   7. Carol ... 7. Carol ...
                                                        8. Stephen Ree...   7. Stephanie G...   8. Kenne... 8. Kenne...

1pm   9. Laura Diaz - ...   9. Jessic... 9. Jessic...

2pm   10. Jame... 10. Jame...

3pm   11. Dorothy Mit...   11. Eric Morgan - Lead...
                             12. Stephanie ...   12. Kathleen Murphy -...

4pm   13. Mellisa Rob...   13. Stephen Reed - Le...
                                                                                                                             14. Cynthia Morris - L...

5pm   15. Laura Diaz - Leads ...

6pm

7pm

8pm

9pm

10pm

11pm

Here is your Smart Chat (Ctrl+Space)   Ask Zia

Multi user day view

Bella Greene and 2 more ▾   Day Week Month   Create Options ▾

Tuesday, January 2, 2024   ‹ Today ›

	9 am	10 am	11 am	12 pm	1 pm	2 pm	3 pm	4 pm
Bella Greene	RIQ_RT - Leads DRT Bell.. 1. Kathl.. 9:09 am - 10:09 am; 2. Steph.. 10:10 am - 11:10 am		3. Nicho.. 11:12 am - 12:12 pm	4. Shirl.. 12:16 pm - 1:16 pm	5. Jonat.. 1:19 pm - 2:19 pm	6. Laura.. 2:23 pm - 3:23 pm	7. Denni.. 3:38 pm - 4:38 pm	8. Jack..
Sam Jackson	RIQ_RT - Leads DRT Sam .. 1. Heath.. 9:21 am - 10:21 am; 2. Maria.. 10:25 am - 11:25 am		3. Jerry.. 11:29 am - 12:29 pm	4. Janet.. 12:38 pm - 1:38 pm	5. Cathe.. 1:42 pm - 2:42 pm	6. Raymo.. 2:46 pm - 3:46 pm	7. Frank.. 3:54 pm - 4:54 pm	8. Ben
Scott Kirby	RIQ_RT - Leads DRT Scot.. 1. Amy R.. 9:08 am - 10:08 am; 2. Anna .. 10:10 am - 11:10 am		3. Jacob.. 11:12 am - 12:12 pm	4. Ryan .. 12:14 pm - 1:14 pm	5. Gary .. 1:18 pm - 2:18 pm	6. Cynth.. 2:20 pm - 3:20 pm	7. Angel.. 3:22 pm - 4:22 pm	8. Eric .. 4:31