



# RouteIQ on the go

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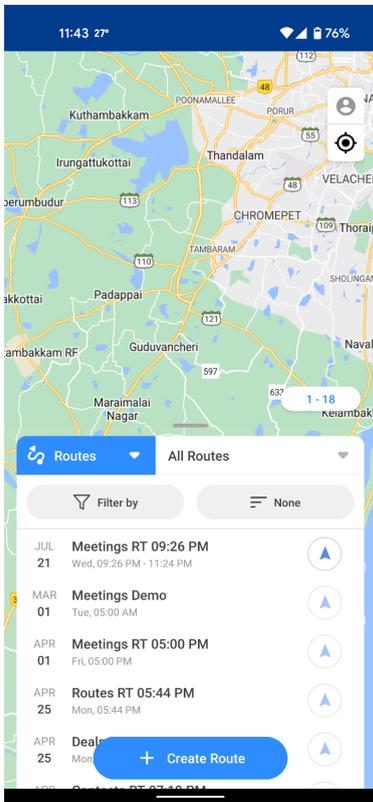
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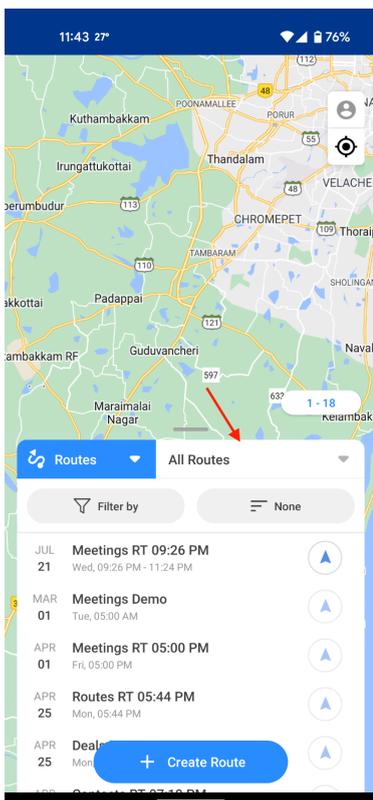
After planning and organizing your field visits for sales, service or delivery activity. You need to travel to visit your prospects. RouteIQ comes with many options that helps you with your travel.



## Changing Views

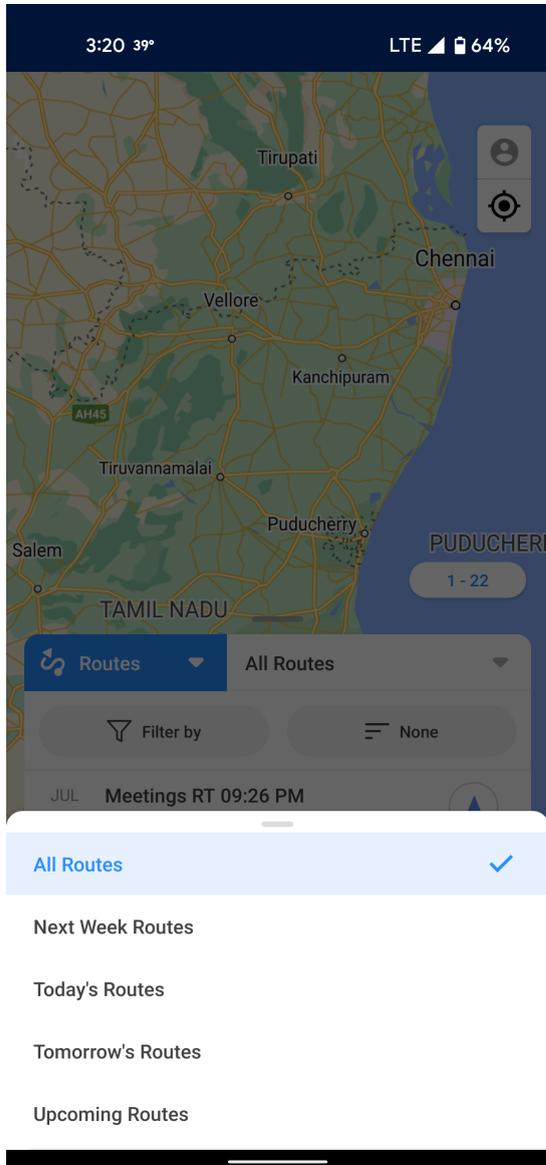
Similar to the Views in Zoho CRM, Module's in RouteIQ also has its own version of views for the Routes module.

1. Tap on the RouteIQ views dropdown, from the Routes module.



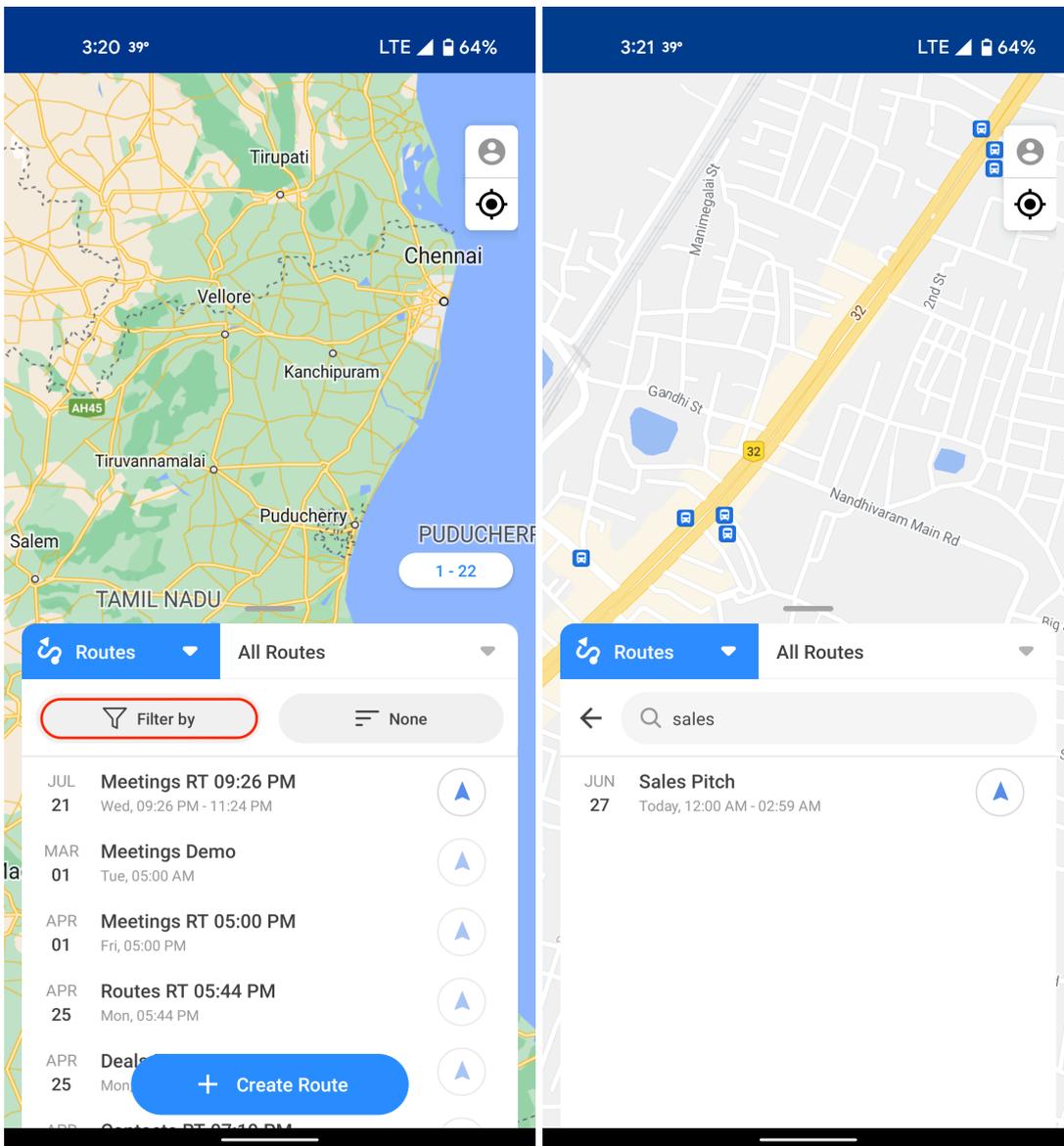
2. Choose the required view. The Routes module comes with these views:

- All Routes
- Next Week's Routes
- Today's Routes
- Tomorrow's Routes
- Upcoming Routes



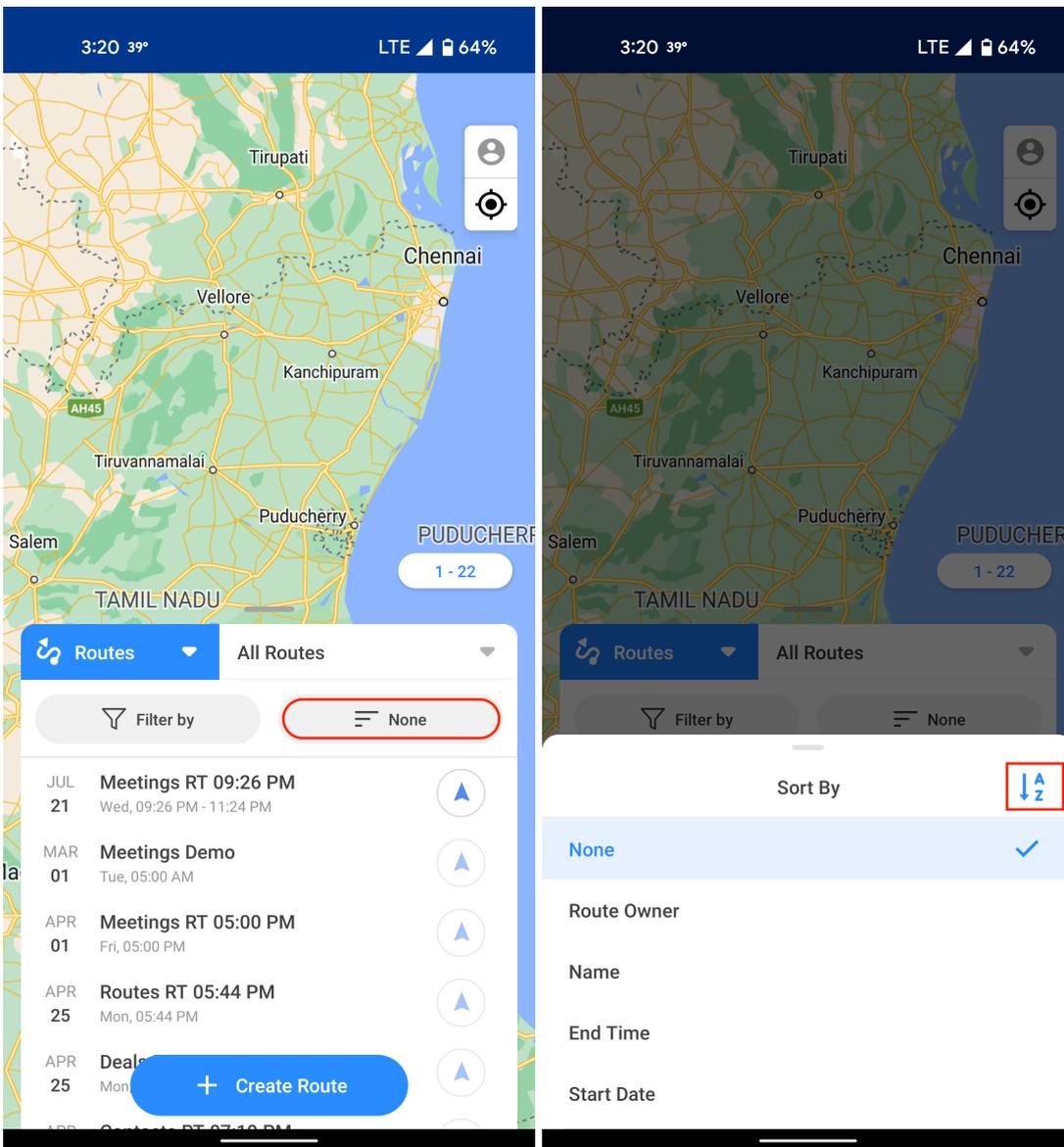
## Filtering

1. Tap the filter by button
2. Enter the criteria by which you want to filter your routes.



## Sorting

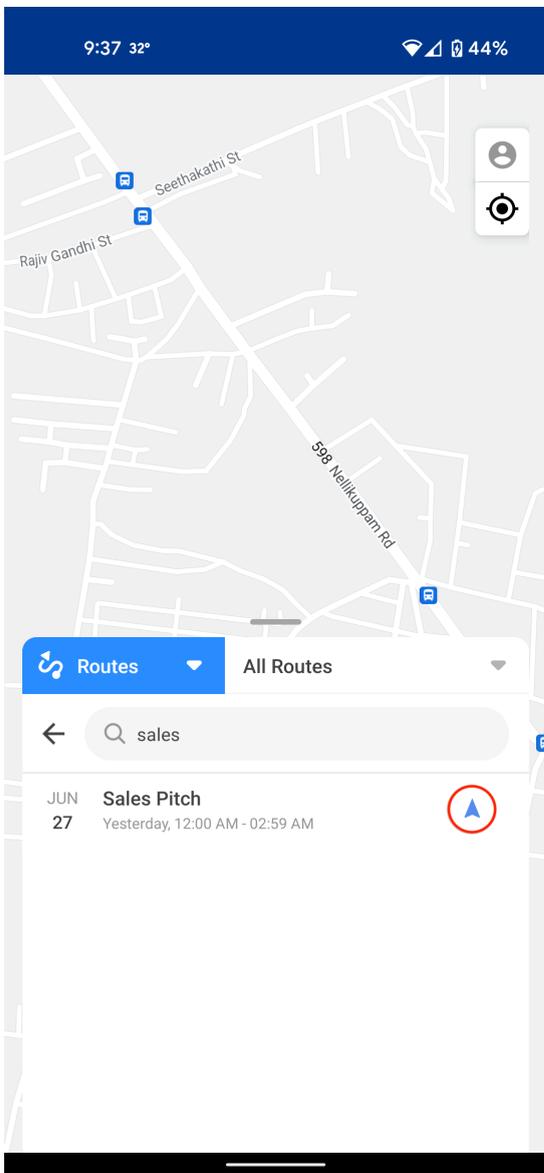
1. Tap the **Sort by** button.
2. Choose the criteria based on which you want to sort your routes.
3. Choose the preferred order of sorting (ascending or descending).



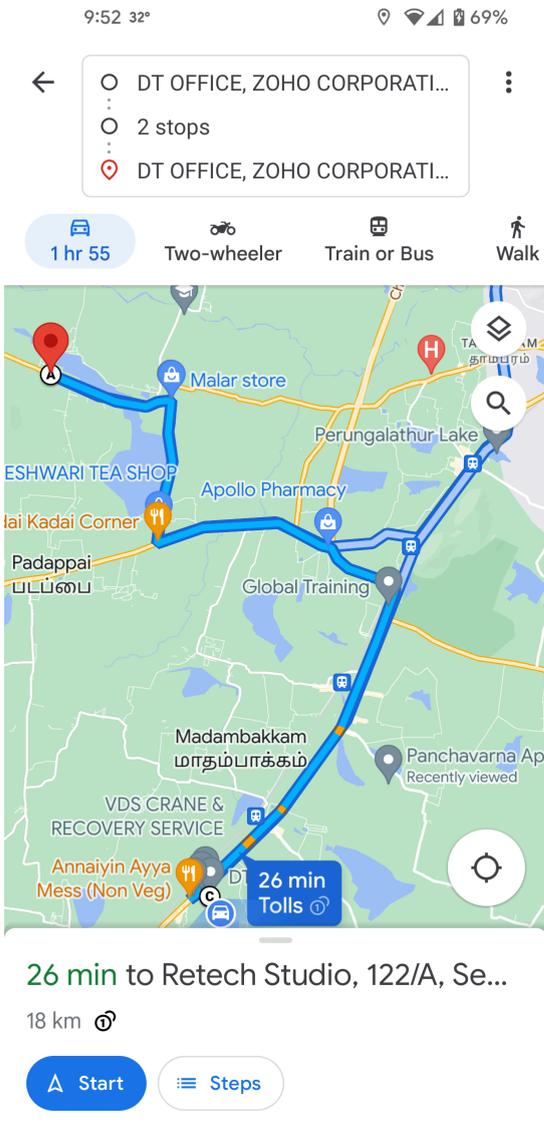
## Navigation

After selecting the route you would like to travel for the day.

1. Tap the navigation button to begin your journey.

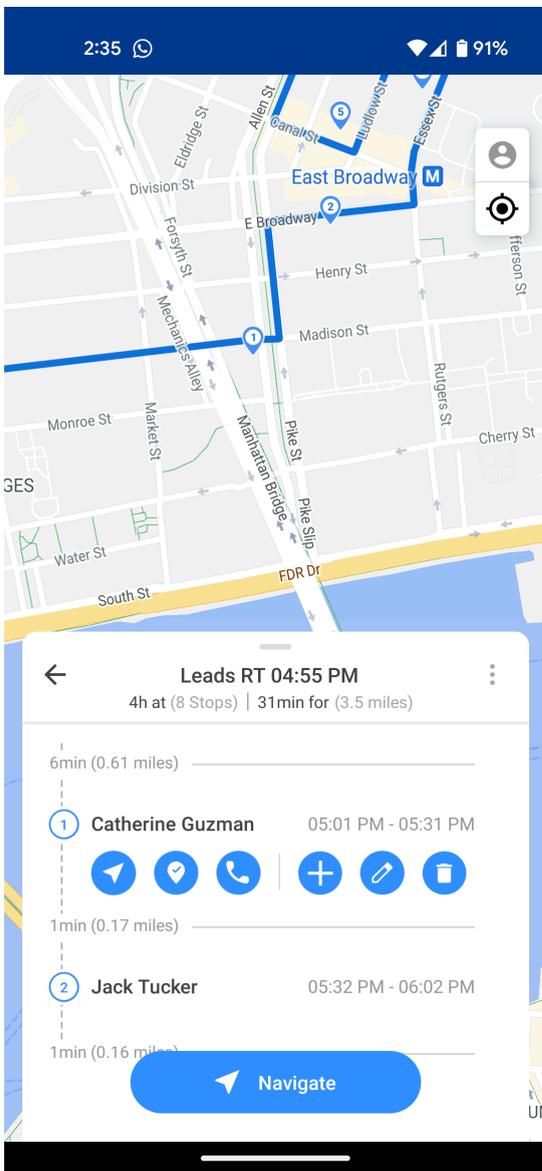


Note: This will open the route in the Google Maps mobile app. If you don't have Google Maps mobile app installed, it will be opened in it browser.



## Stop Options

RouteIQ provides a few stop options that enables users to perform quick actions.



## Navigation

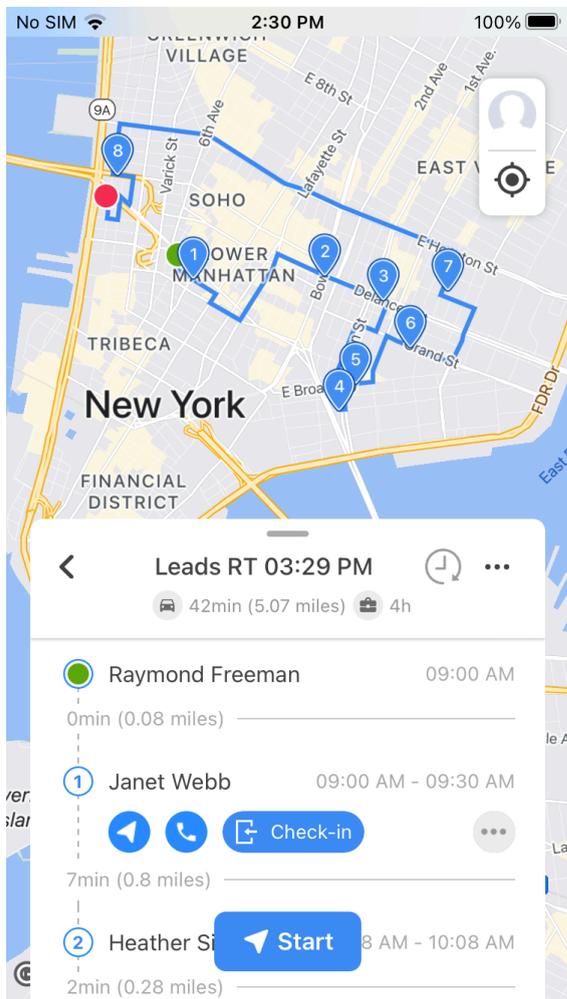
Tap the **Navigation** button under a route, to navigate to that specific stop.

## RouteIQ Check-in/out and Proof of Delivery

Log your arrival and departure information with check-in/out and capture information like time and date, location, etc.

**i** Feature Availability: RouteIQ Check-in/out is available in the Professional Edition.

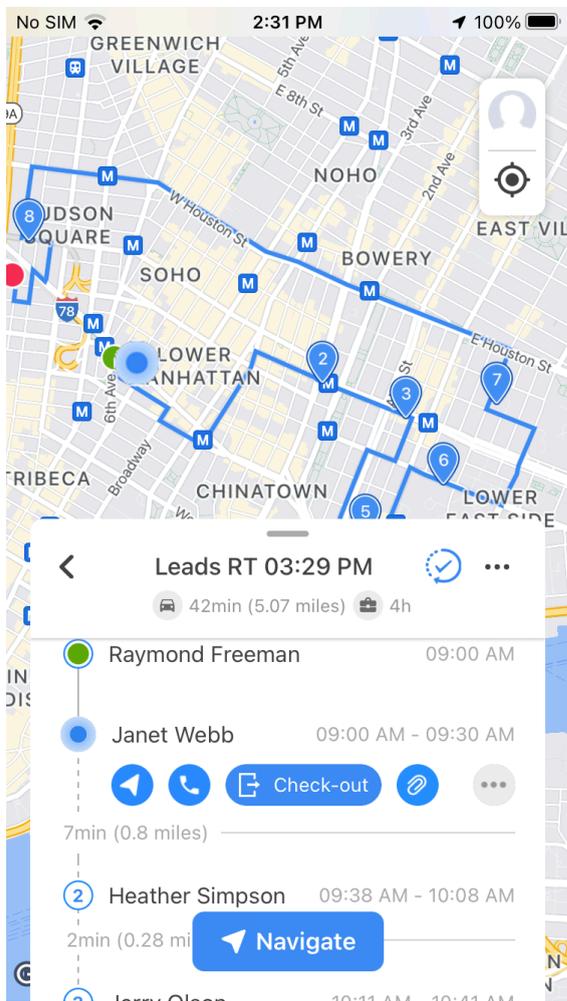
## Check-in



1. Tap the check-in icon to check-in at the stop.

- For a Meeting record, RouteIQ will automatically check-in with Zoho CRM as well.
- For a non-Meeting record, RouteIQ will create a meeting and check-in.

## Check-out

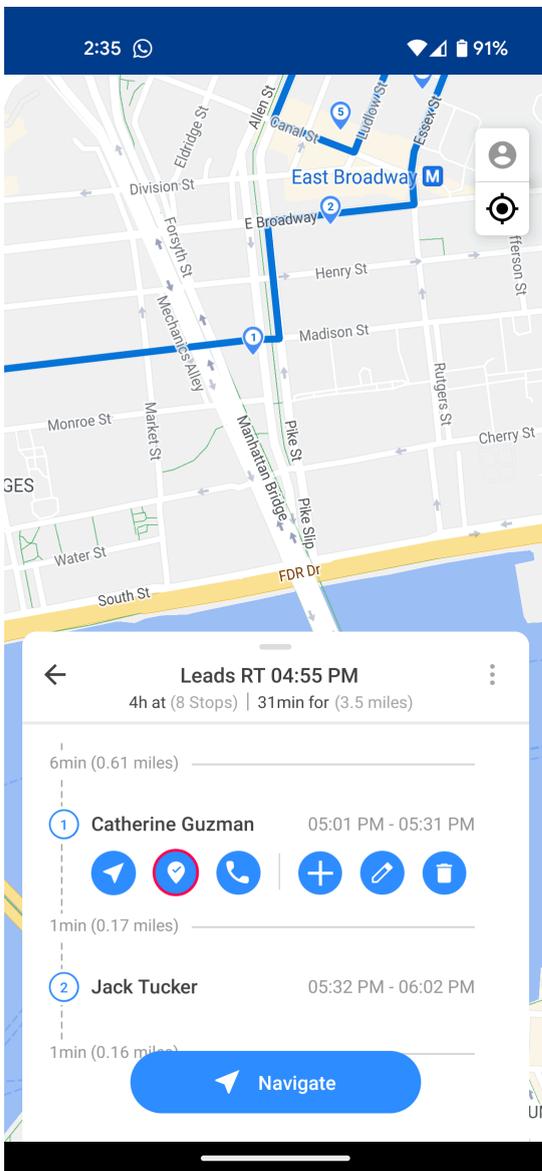


1. Tap the check-out icon to check-out at the stop.

## Proof of Delivery

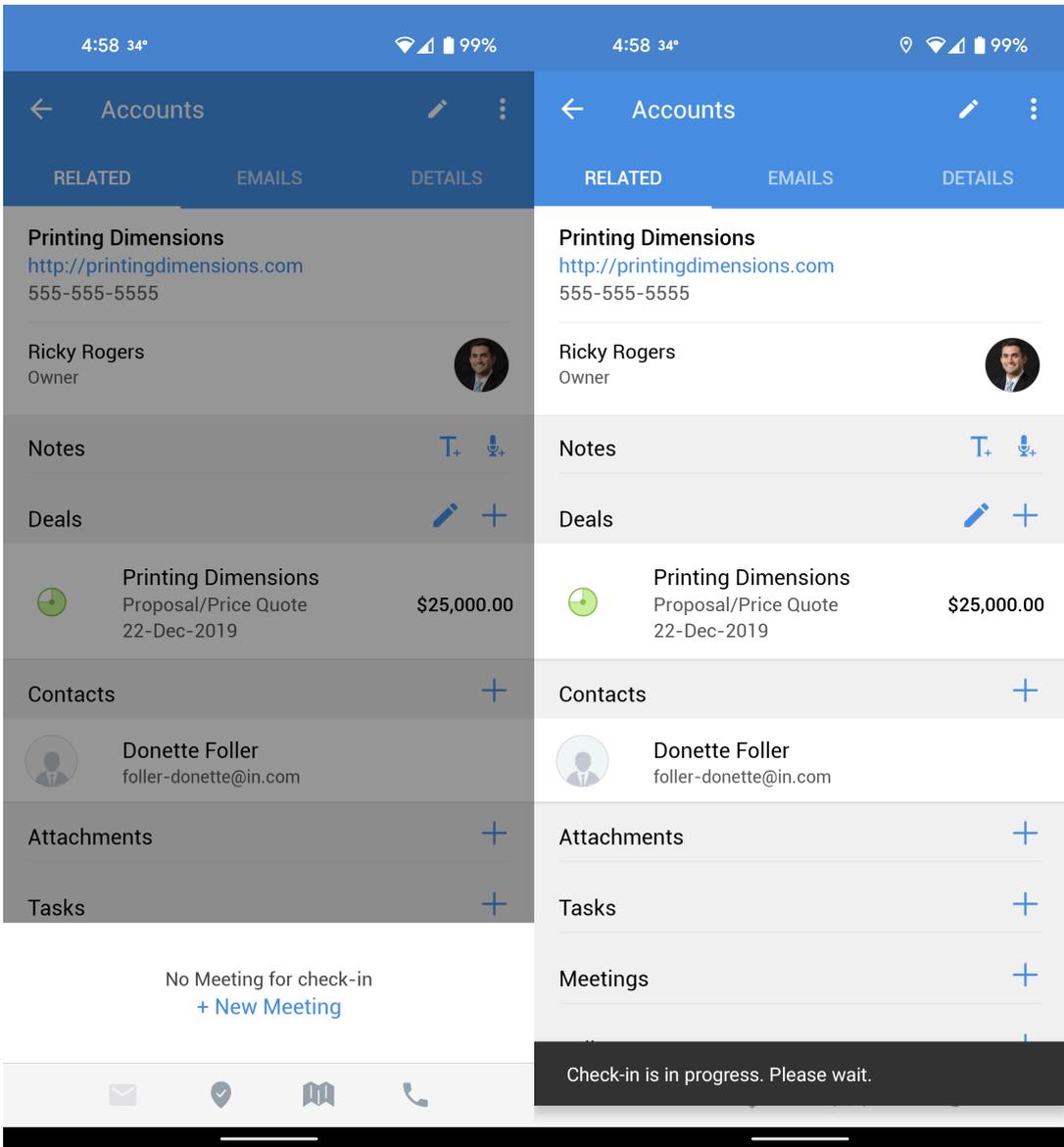
You can add attachments such as images, videos, voice recording and use them as visit or delivery proof. This will be stored under the meeting record of the record to be accessed later.

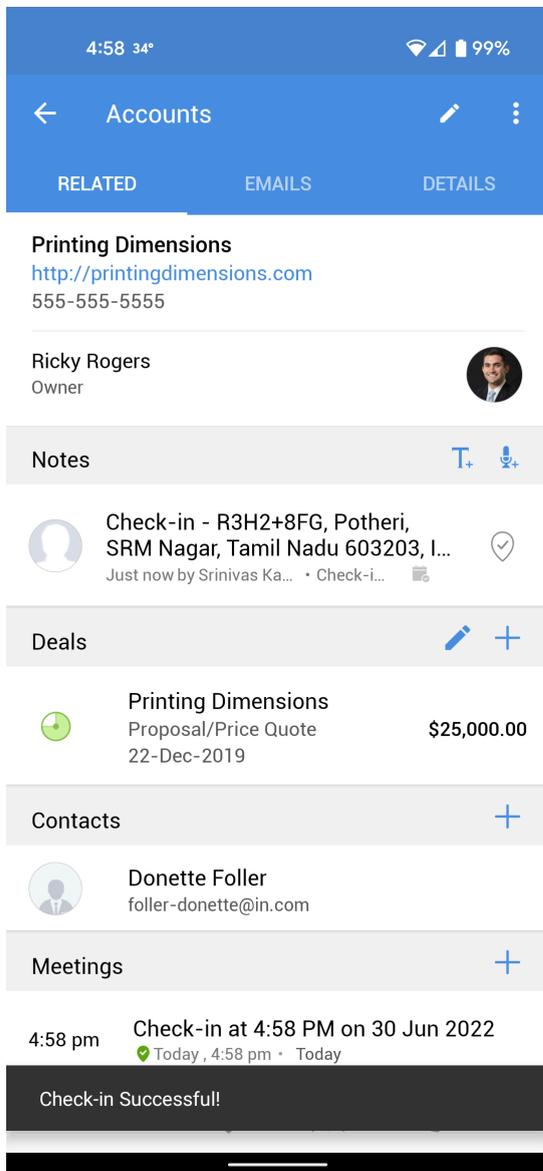
## Zoho CRM Check-in



1. Tap the check-in icon to check-in at the stop.

- For a Meeting record, RouteIQ will redirect you to the Zoho CRM mobile app and will automatically check in.
- For other module's records, RouteIQ will redirect you to the Zoho CRM mobile app. Where you will have to create a new meeting and check in.





## Call

Tap the **Phone** button to call the person with whom you are meeting.

## Add Stop

Tap the add stop button to add a stop on the go quickly and adjust for last moment changes.

## Edit Stop

Tap the **Edit stop** button to quickly change details about the stop, such as duration or timing.

## Delete Stop

Tap the **Delete stop** button to remove the stop from your route.