



Zoho Corporation

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# Visualizing Zoho CRM modules and views - Mobile

Map visualization provides a visual alternative to a simple list view for your Zoho CRM modules and views. It enables you to visualize your CRM data on an interactive map and filter them based on specific criteria.

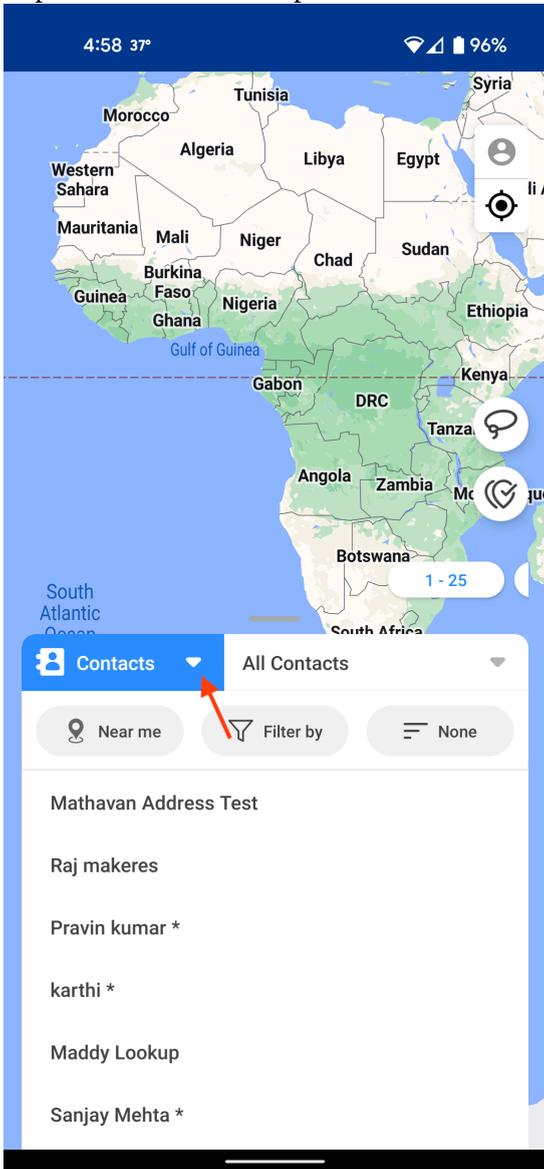
## Modules

There are two types of modules in RouteIQ:

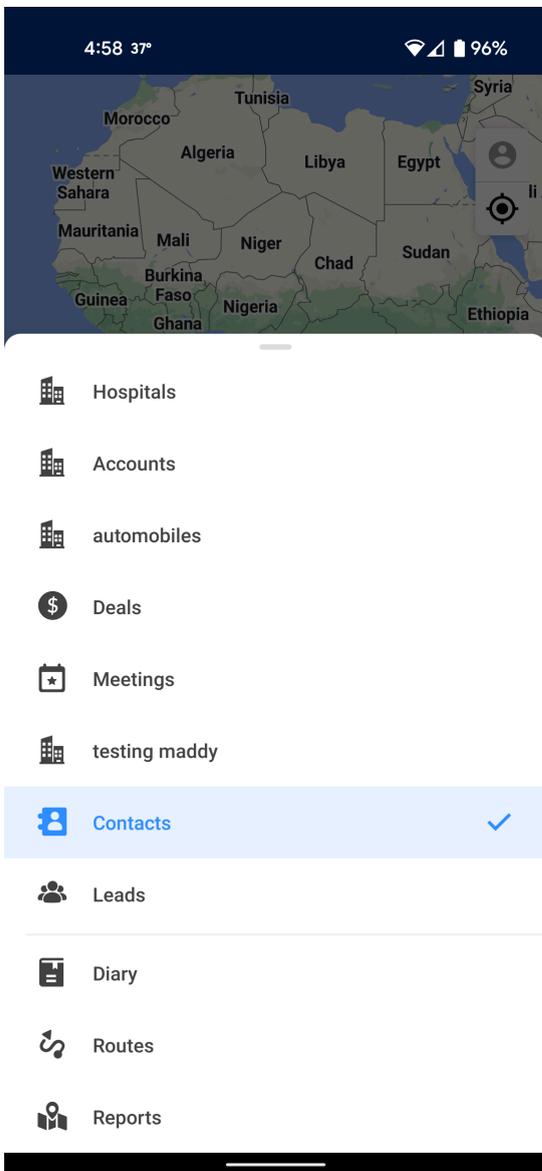
- Integrated CRM modules ([Learn how to integrate RouteIQ with Zoho CRM modules](#))
- RouteIQ exclusive modules

## Changing Zoho CRM module

1. Tap on the module dropdown. This will list all the integrated Zoho CRM and RouteIQ modules.



2. Tap on a module to visualize its data on the map.

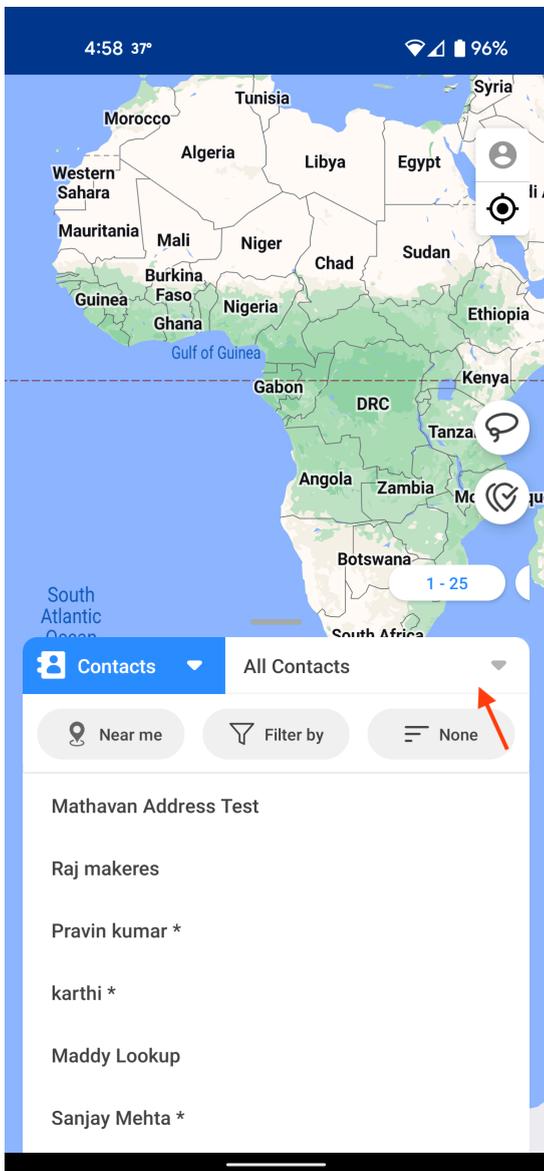


## Views

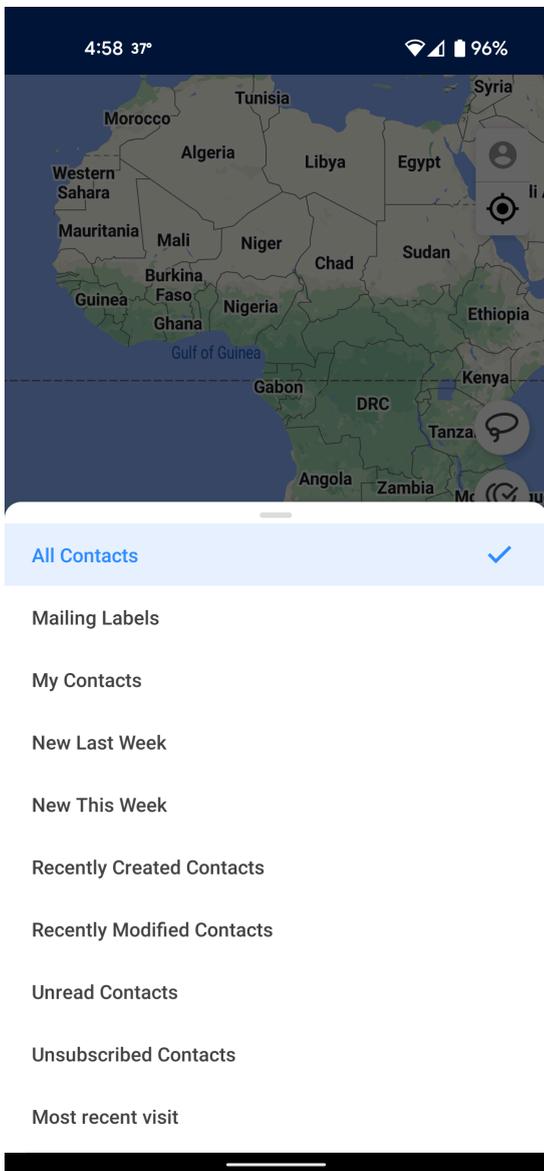
Views in RouteIQ are the same Zoho CRM views that were integrated with RouteIQ earlier. ([Learn how to integrate RouteIQ with Zoho CRM views](#))

## Changing Zoho CRM views

1. Tap on view dropdown. This will list all the integrated views of the module.



2. Tap on the required view.



Map visualization comes with many options to handle the vast number of records from the chosen CRM module. The options are explained below.

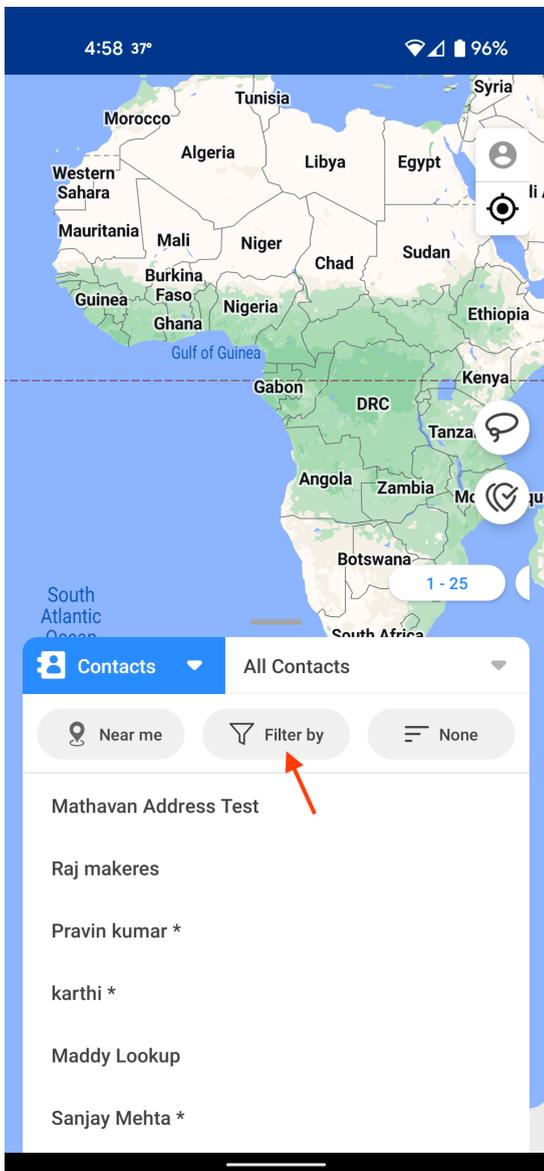
## Filter

The filter feature helps narrow down the number of records in the list so that you can quickly find the desired records.

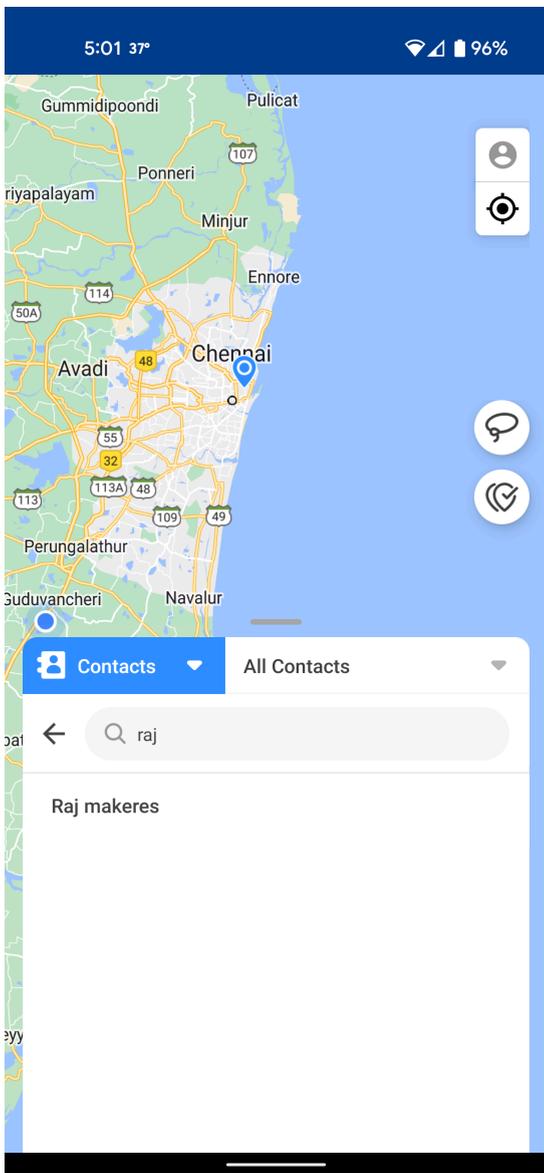
**Note:** For the time being, you can filter based on the name of the record only.

## Filtering records

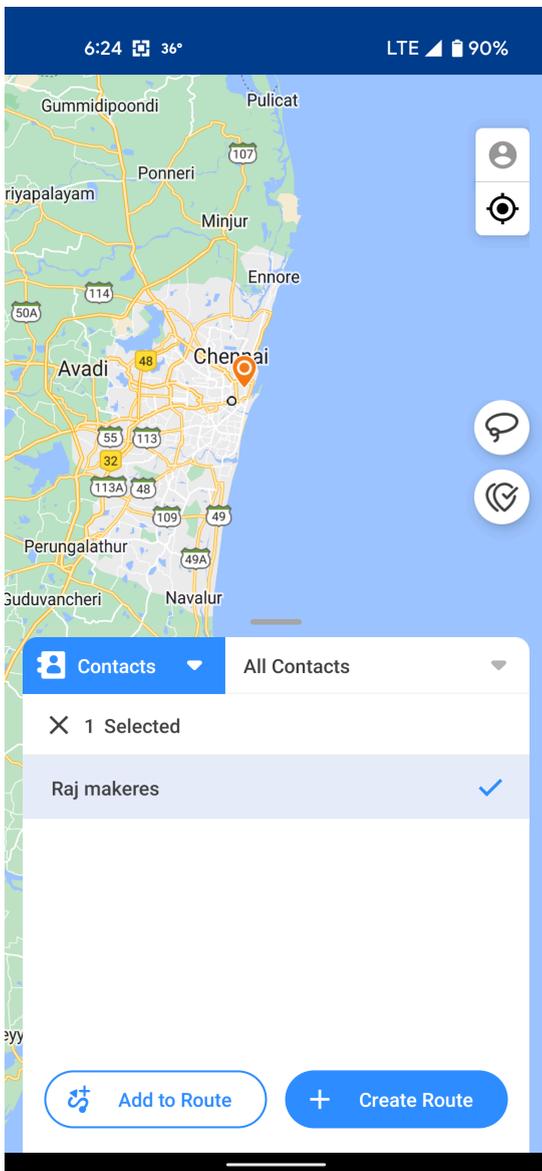
1. Tap on the **Filter by** button.



2. Enter the name of the record you're looking for.



3. Tap **Enter**.

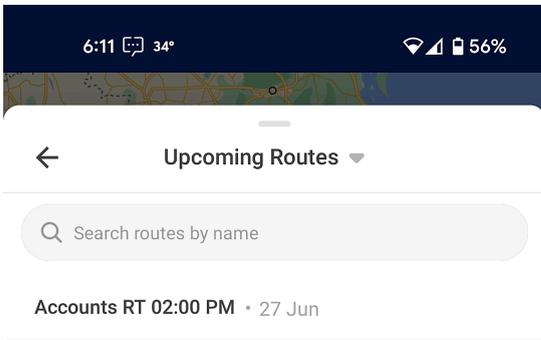


4. Select the record and do either of the following:

- a. Tap **Create Route** to create a new route (click here to learn how to create a new route).

(OR)

- b. Tap **Add to Route** to add the record to an existing route.



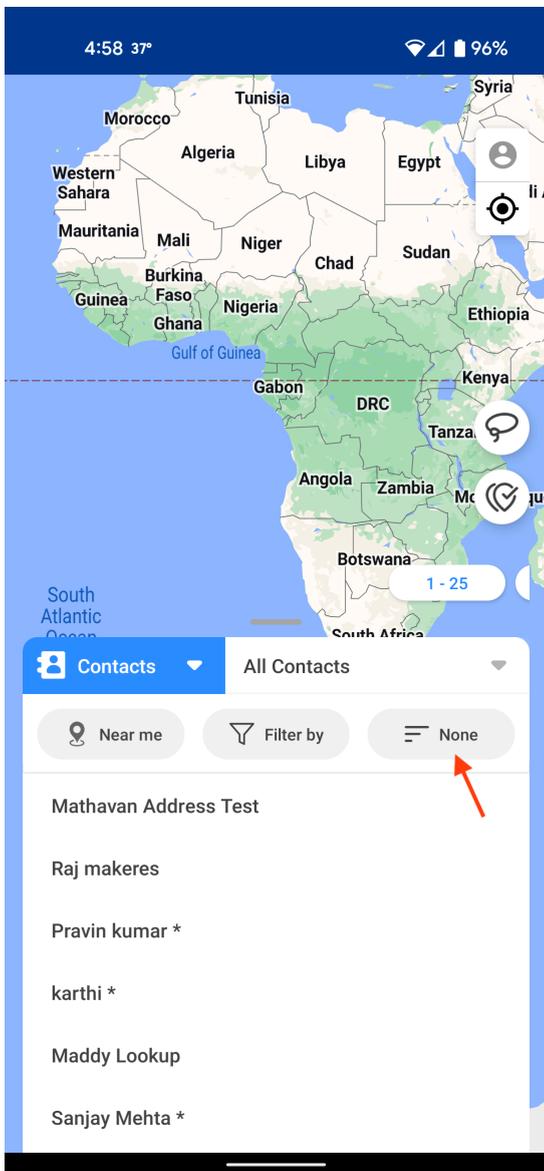
Add to Route

## Sort By

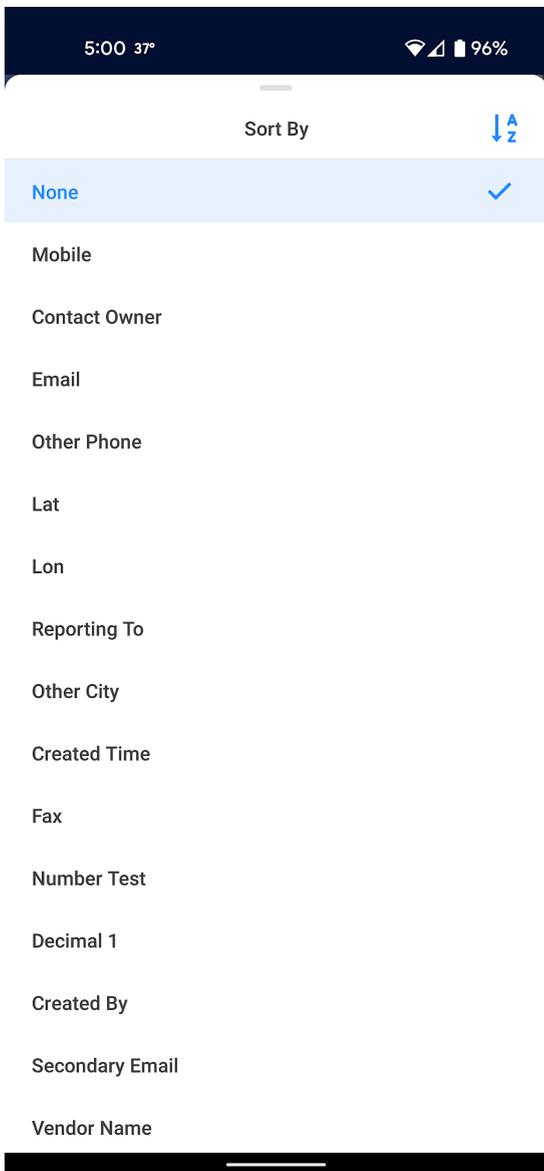
The Sort By option enables you to rearrange records in the list view based on a required field in the module and to set the order of the records in the view as ascending or descending.

## Sorting records

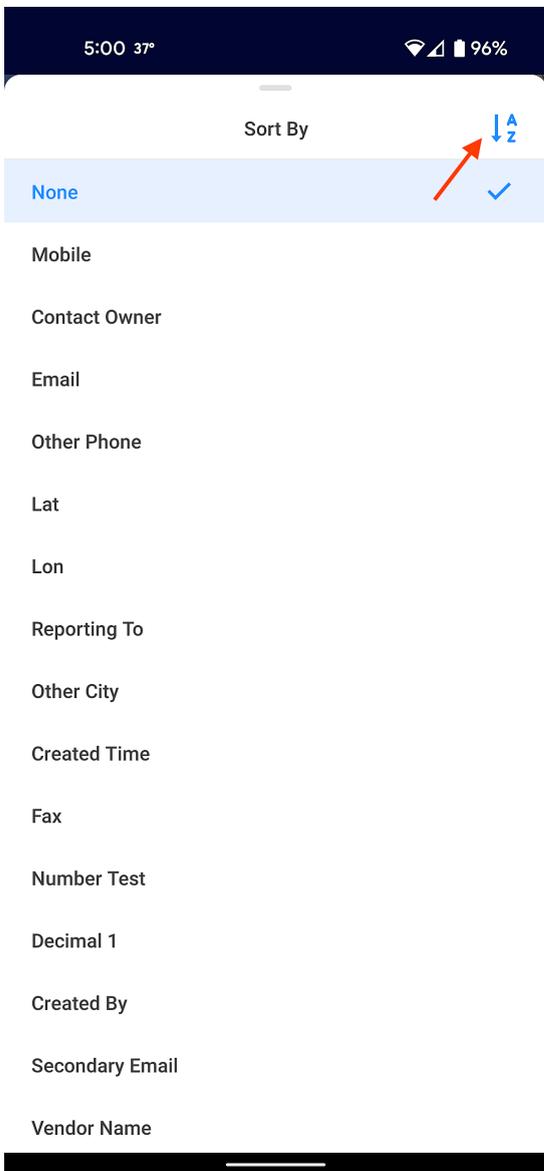
1. Tap the **Sort By** button.



2. Choose the field by which you want to sort your records.



3. Choose the preferred order of sorting (ascending or descending).



## List View

The list view provides a simple list of the records present in the selected module and view.

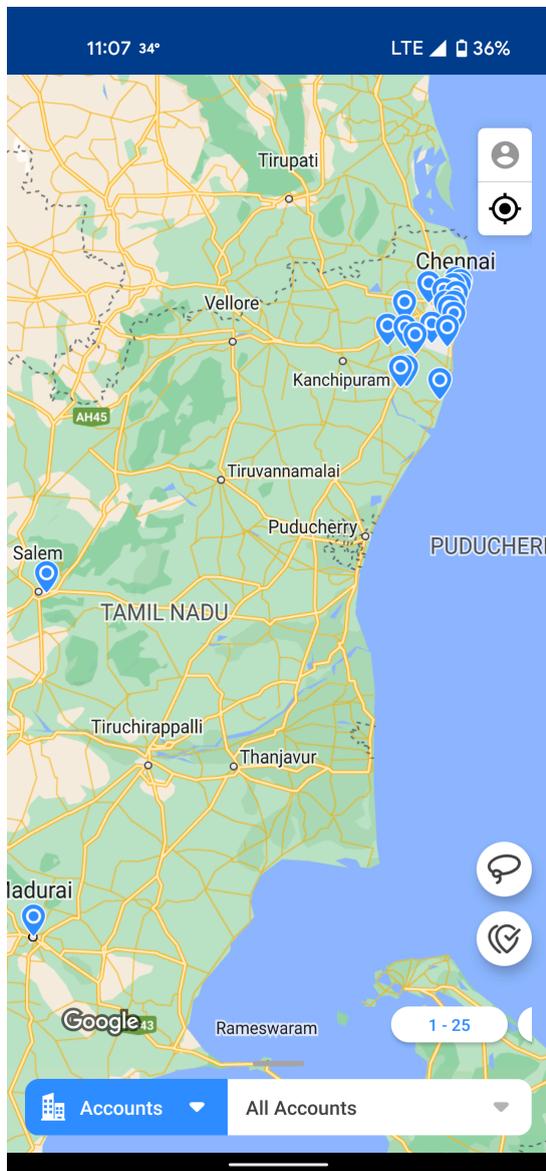
### Viewing records as a list

The list view is enabled by default in the mobile app. You can scroll down to view more records.

The list in the mobile version of RouteIQ has three states:

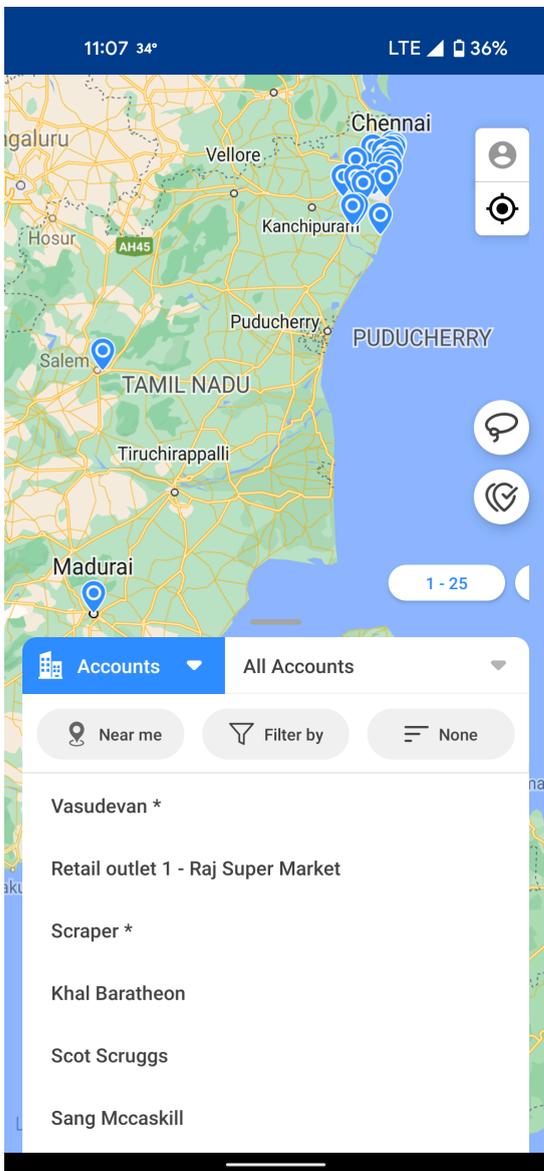
#### ***Completely closed***

You can swipe up from the pull tab to move to the second state.



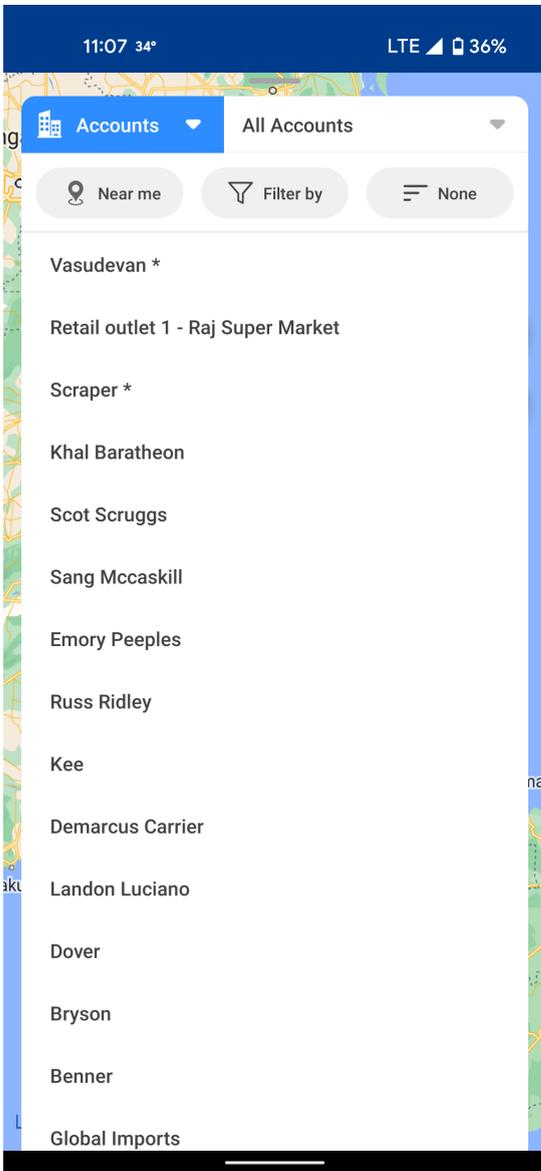
### ***Halfway open***

When you swipe the pull tab once, the list opens halfway. You can swipe up or down in the list to view records.



### ***Completely open***

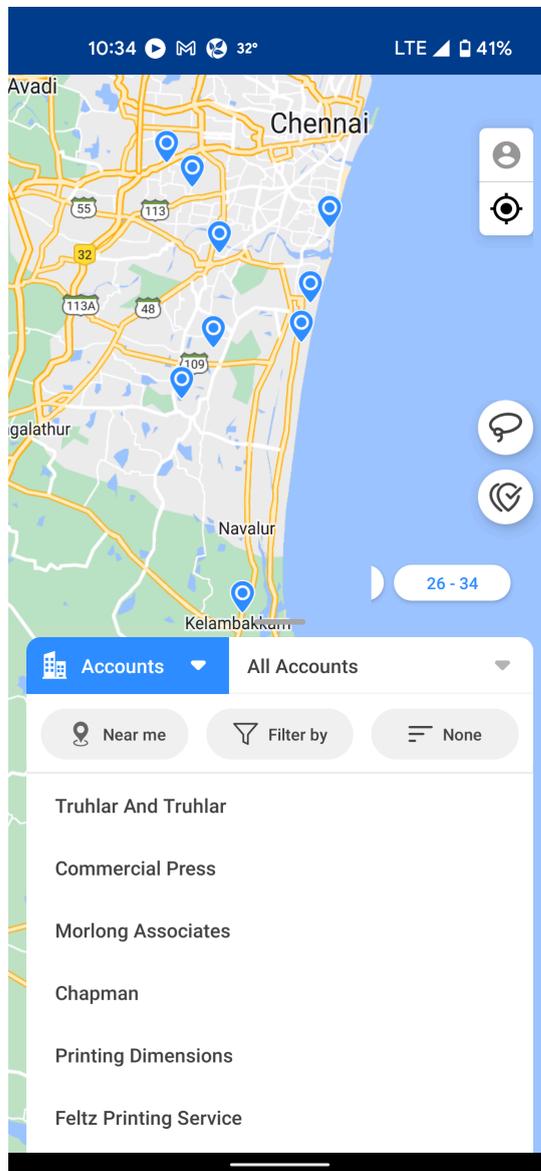
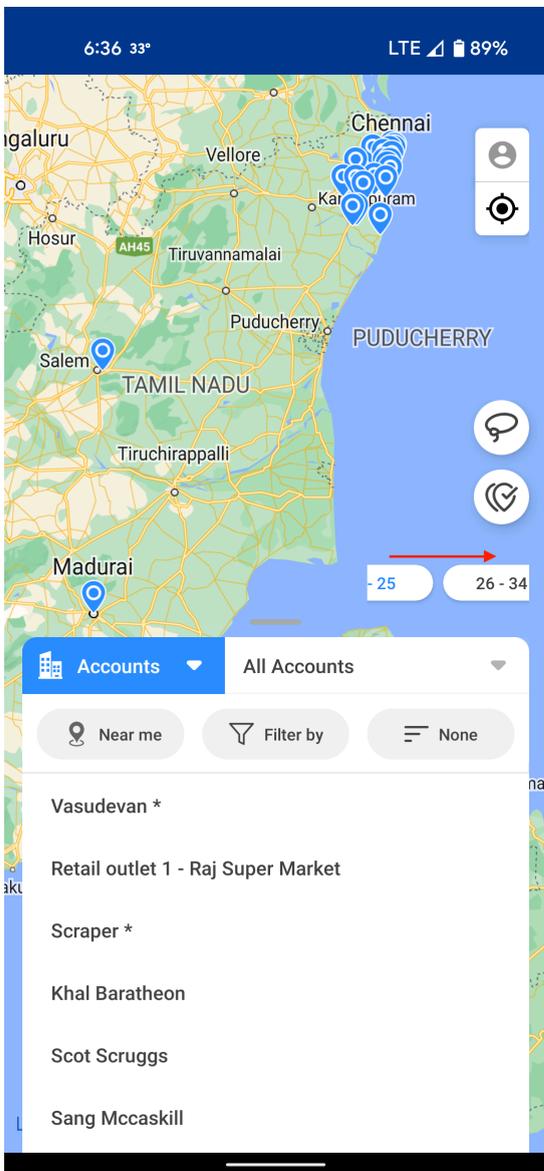
When you swipe the pull tab once again, the list opens completely. You can swipe up or down in the list to view records.



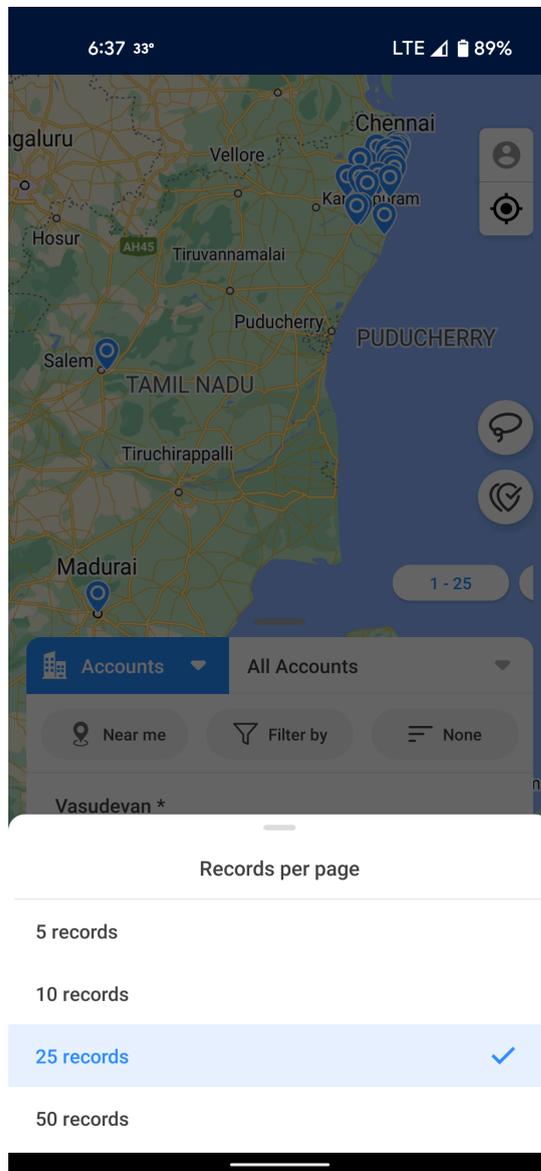
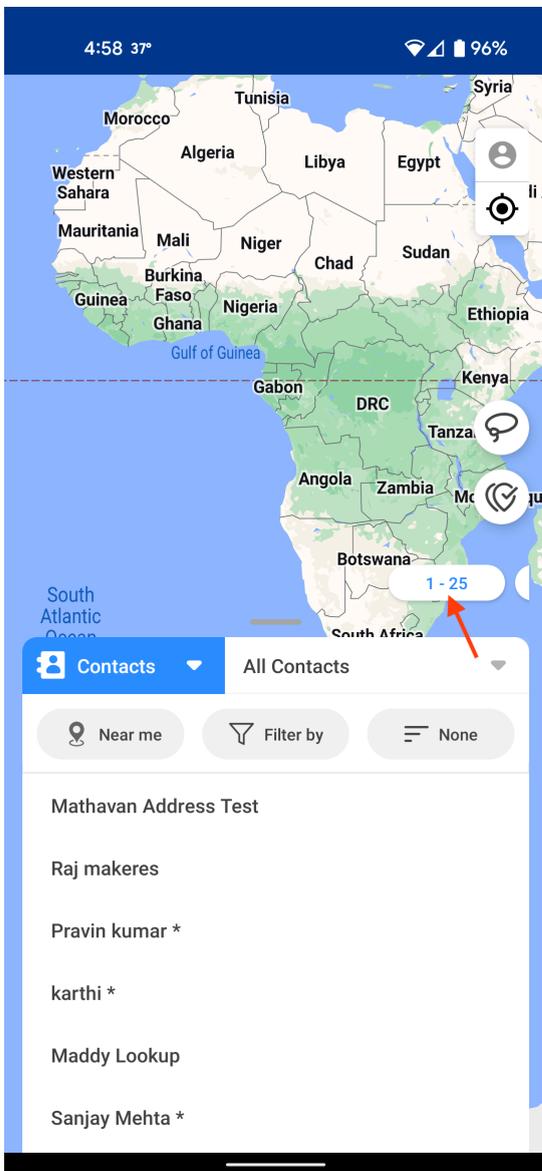
## Pagination

Pagination helps you manage the vast amount of Zoho CRM data by organizing it as pages. Up to 50 records can be visualized at once in the mobile app.

1. Swipe on the pagination scroll to switch between pages.



2. Tap on a page to change the number of records per page view on the map.



## Non-mappable Records

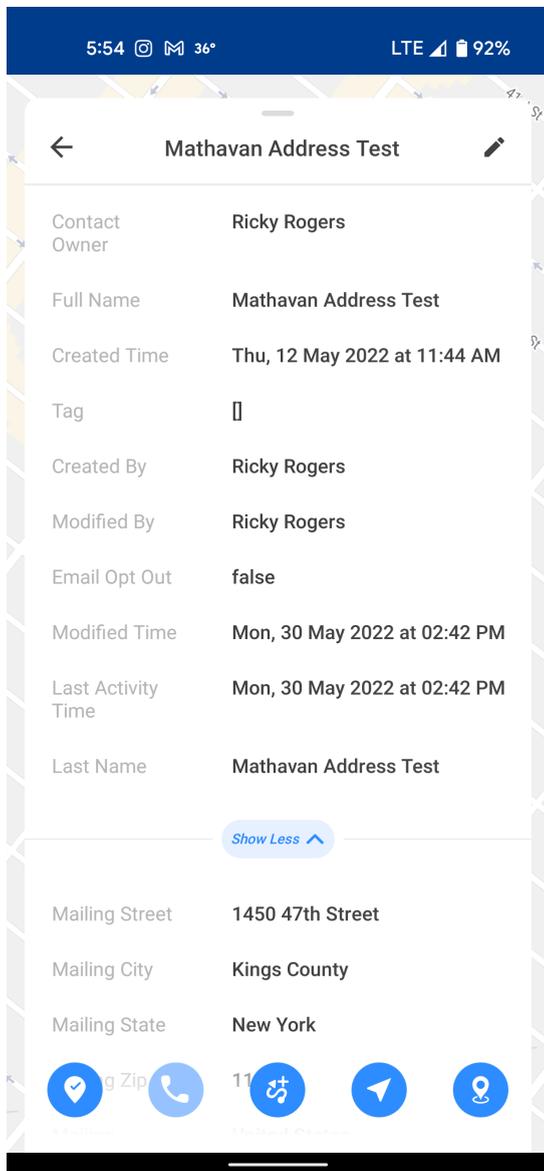
A non-mappable record is one whose address cannot be located on the map.

If you see that a record is non-mappable, it could mean two things:

- The address entered into the address field in Zoho CRM is invalid. Check whether the address is entered correctly.
- You have run out of record credits. If so, you can buy more from store.zoho.com. [Click here to learn how.](#)

## Detailed record view

1. Tap on the record name in the list to view additional information. This will provide the information from the tabular view in Zoho CRM.

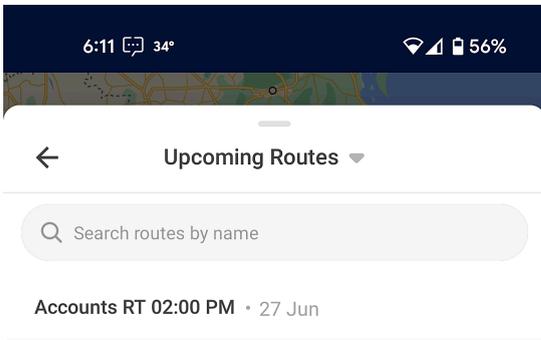


2. For more information, tap **Show More**.

## Additional options

There are five additional options:

- **Check in:** This redirects you to the Zoho CRM mobile app to check in for that record. [Learn more about check-in.](#)
- **Call:** Enables users to make calls from the app.
- **Add to existing route:** Enables users to add a record to an existing route quickly.



- **Navigate:** Redirects to Google Maps for navigation.
- **Nearby:** Shows the records around the selected record within a certain radius.
  - Tap on the radius button to change the radius.

