



Explore - Mobile

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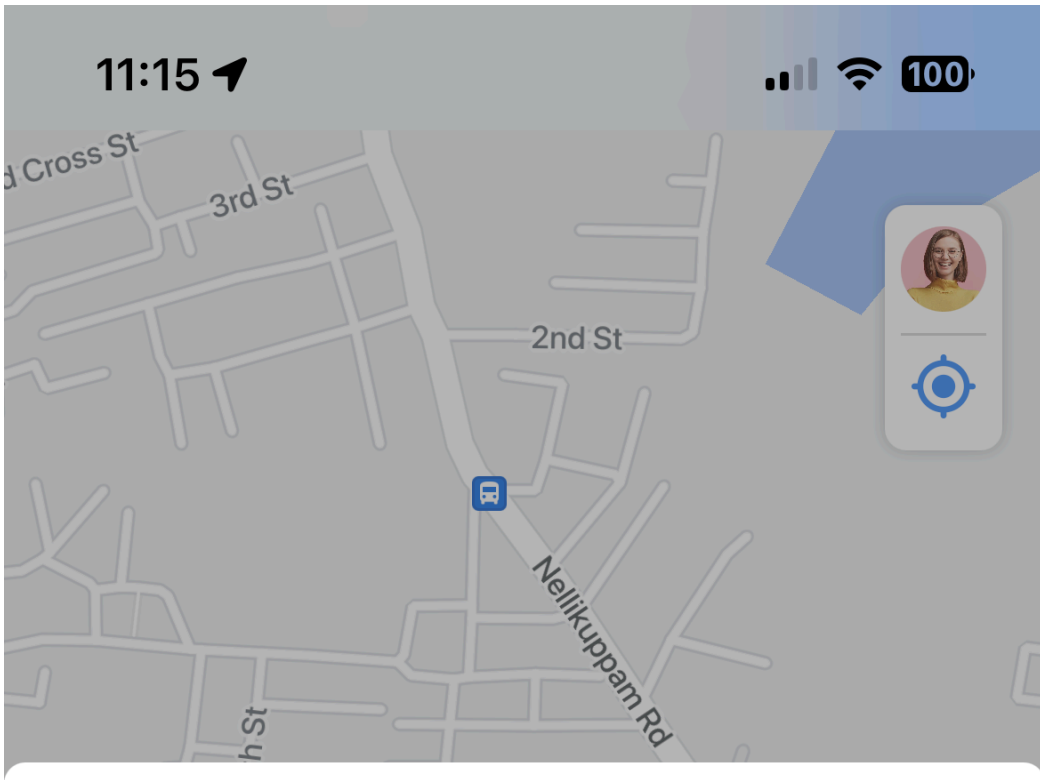


^ **Selecting modules**



Explore enables you to simultaneously visualize records from multiple Zoho CRM modules spread across an area.

Accessing Explore



 Distributors

 Service Requests

 Customers

 Leads

 Accounts

 Deals

 Contacts

 Diary

 Routes

 Reports



Explore

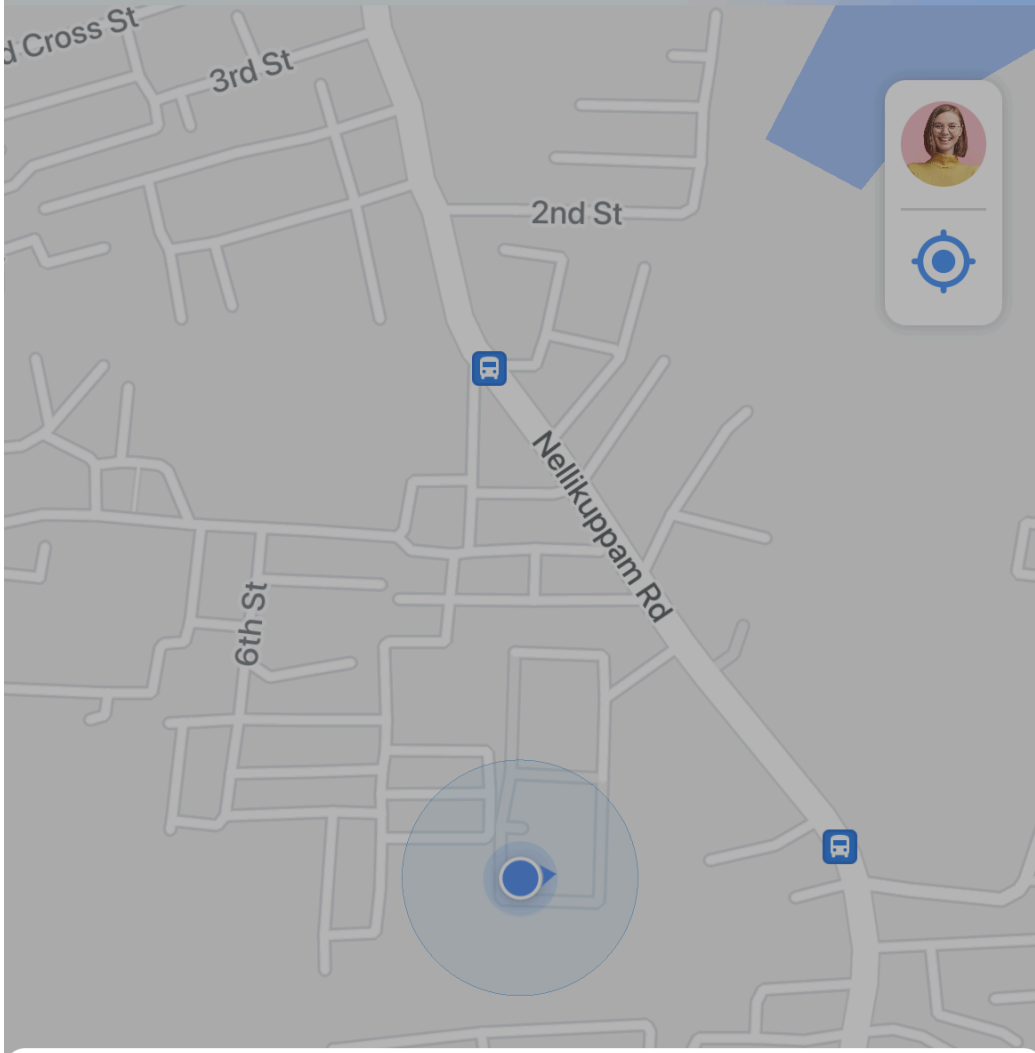


1. Tap the module dropdown. This will list all the integrated Zoho CRM and RouteIQ modules.
2. Tap **Explore** to view records from the multiple modules.

Selecting modules

You can simultaneously visualize records of up to 10 different modules.

11:15



Clear

Select

Done

- Distributors
- Service Requests
- Customers
- Leads
- Accounts
- Deals
- Contacts

-
1. Tap the drop-down icon beside the modules field.
 2. Tap **Clear** if you want to start from scratch.
 3. Select the modules you want to Explore.
 4. Tap **Done**.

Note: When there are more than 500 pins in an area, the records are displayed as clusters on the map.

Limitation: Explore supports up to 2000 records. If there are more than 2000 records, the closest 2000 records to the map center are displayed. Explore supports an map area of 1000 sq. km or 600 sq. mi. Zoom in on the map to Explore

Note: You can distinguish records from different modules based on the color of the pins. Each module is matched with a unique color. Records from a module are colored based on the color of the checkbox in front of the module name.

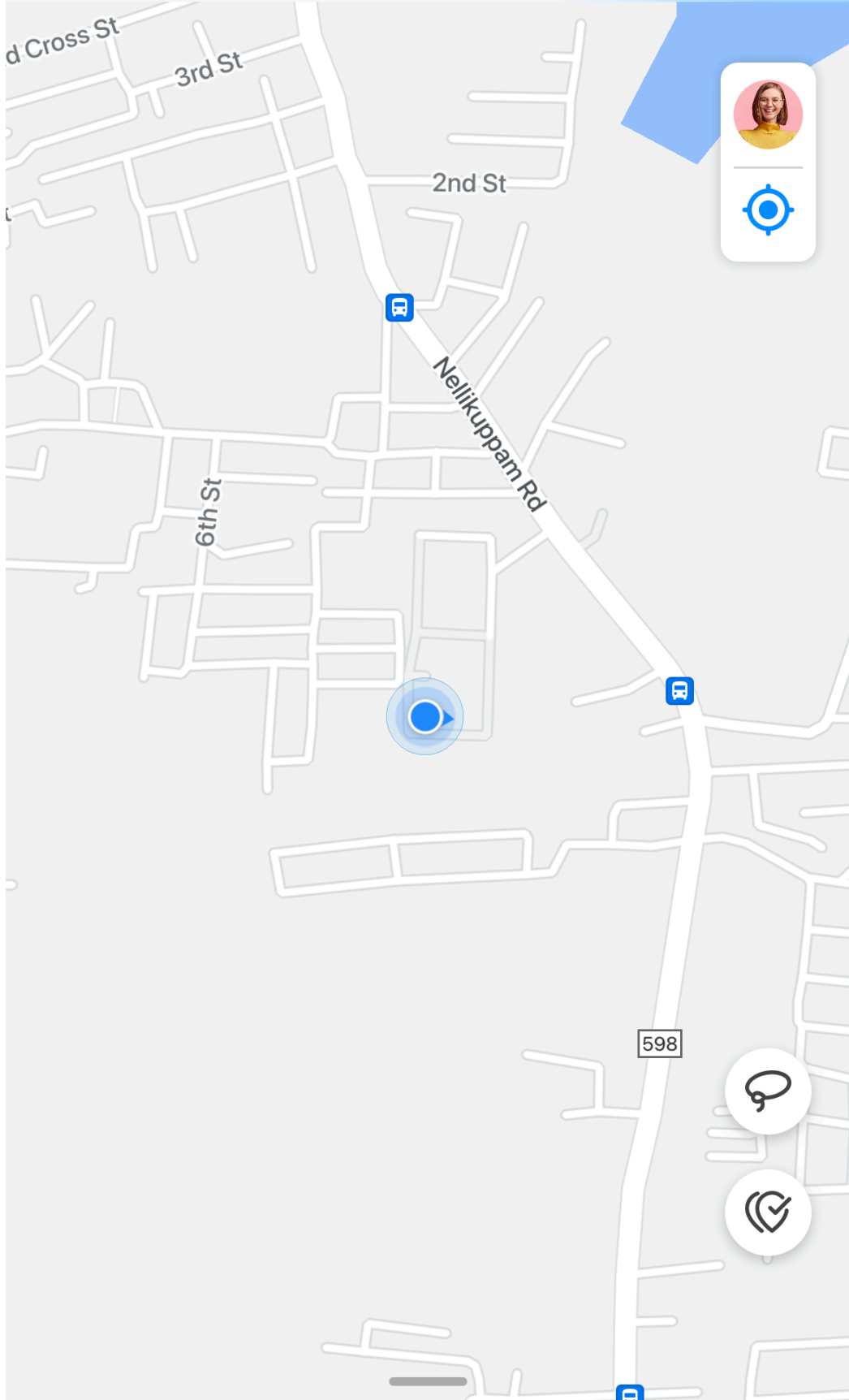
Go To

The Go To option helps you search and locate a place to Explore its surroundings.

1. Tap **Go To**

11:15

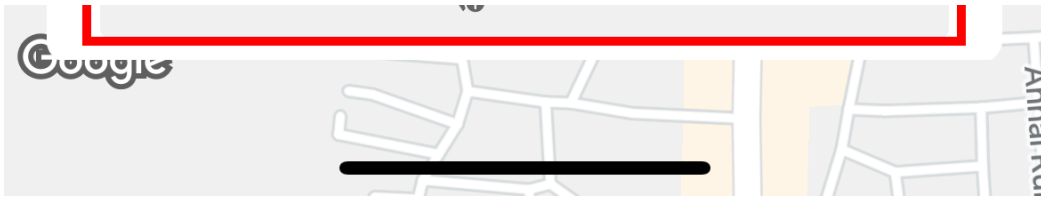
100



Explore

All Modules

Go To



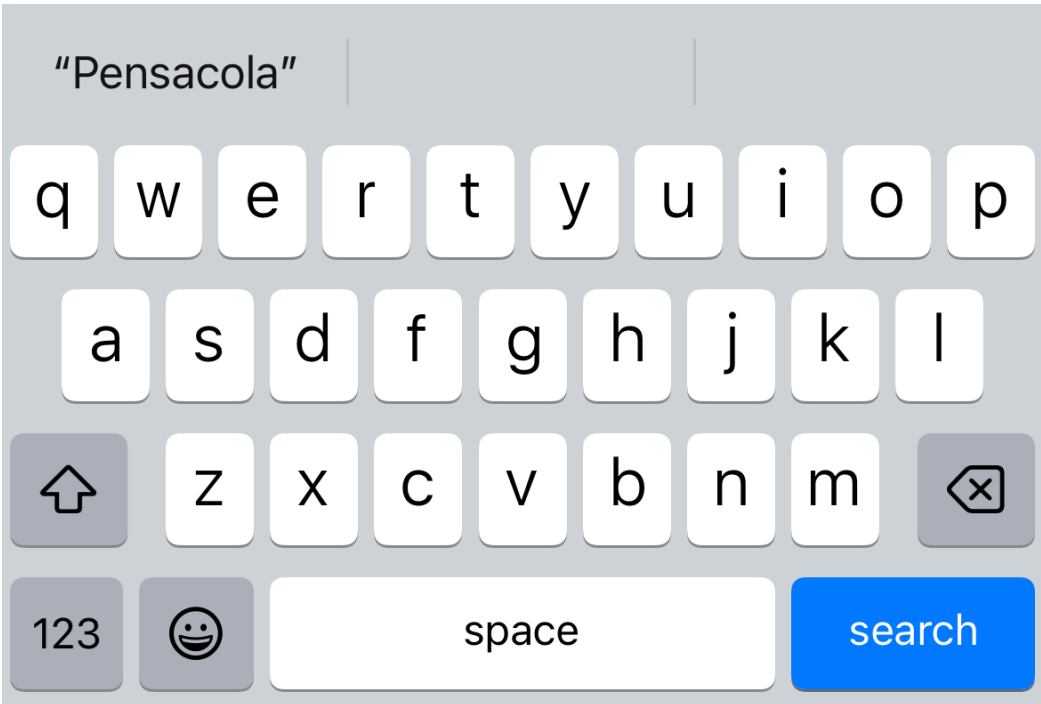
2. From here, you can

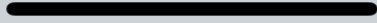
- Search for a place and choose from the search results.
- Choose from favorite places to Explore
- Choose a location from your search history

🔍 Pensacola ×

Cancel

- 📍 Pensacola, FL, USA
- 📍 Pensacola Beach, FL, USA
- 📍 Pensacola International Airport (PNS) (PN...
- 📍 Pensacola Christian College, Brent Lane,...
- 📍 Pensacola, FL, East Wright Street, Pensac...





🔍 Search for a place or address

Cancel

Recent

🕒 Pensacola, FL, USA ✕

Favorite Places

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