Zoho Corporation

Live Tracking

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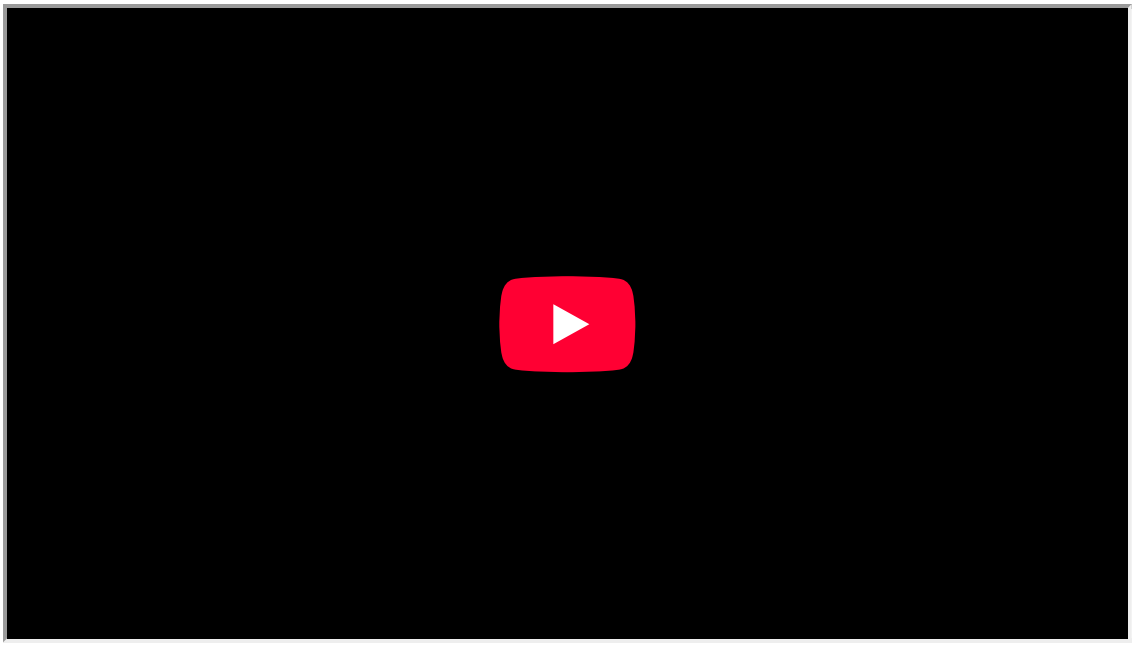
Live tracking helps you view the live location of your field sales, service, or delivery agents on a map.

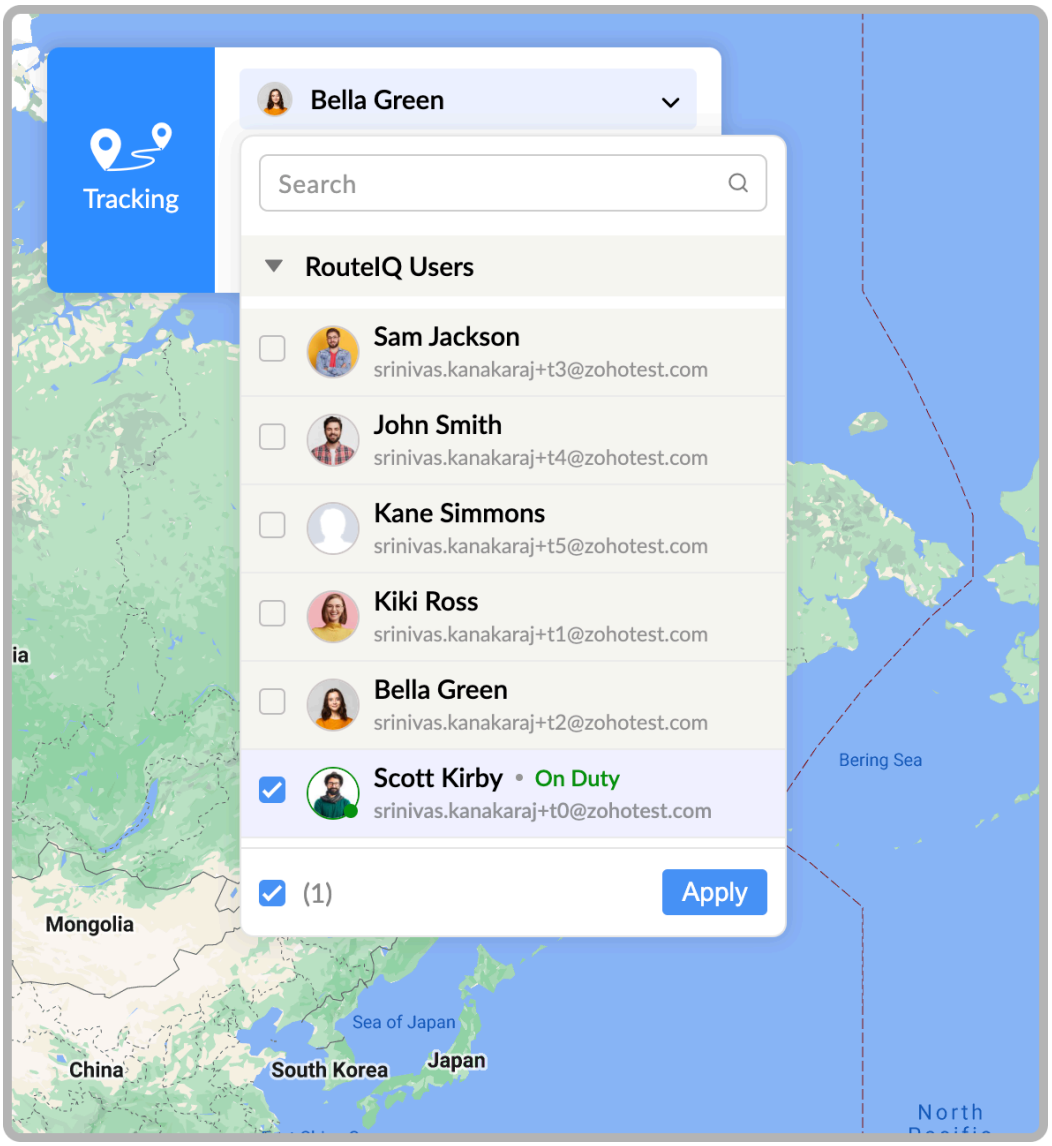
Note: Live tracking is a paid add-on in RouteIQ for Zoho CRM.

Overview Video



Viewing the live location of users

1. Select Live in the Tracking module in RouteIQ.
2. Select the users you want to track.



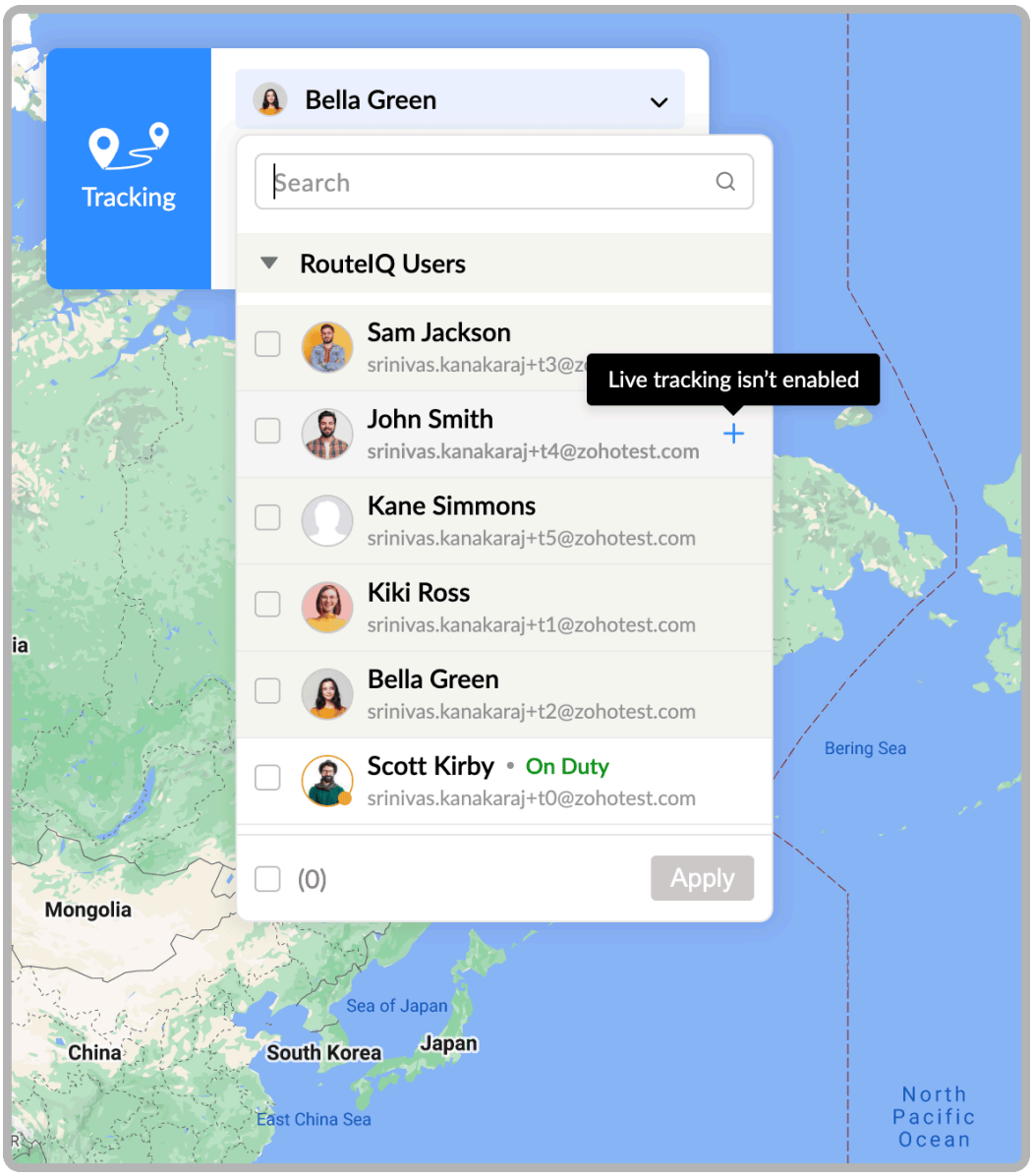
Note: You can select up to 10 users. You can only track on-duty users.
On-duty users: These are users who can be tracked as they are in the window based on the tracking type setup in user management.
Off-duty users: These are users who can't be tracked as they are outside in the window based on the tracking type setup in user management.

Enabling live tracking

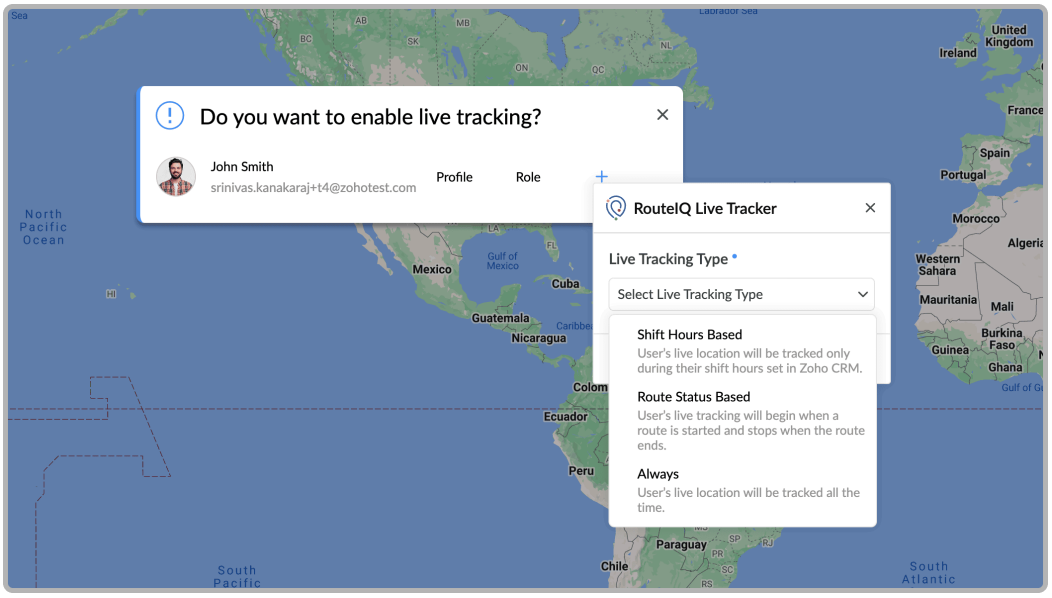
Users without tracking status (on-duty or off-duty) haven't had the live tracking feature enabled for them.

You can enable live tracking for them by:

1. Clicking the '+' icon beside the user's name



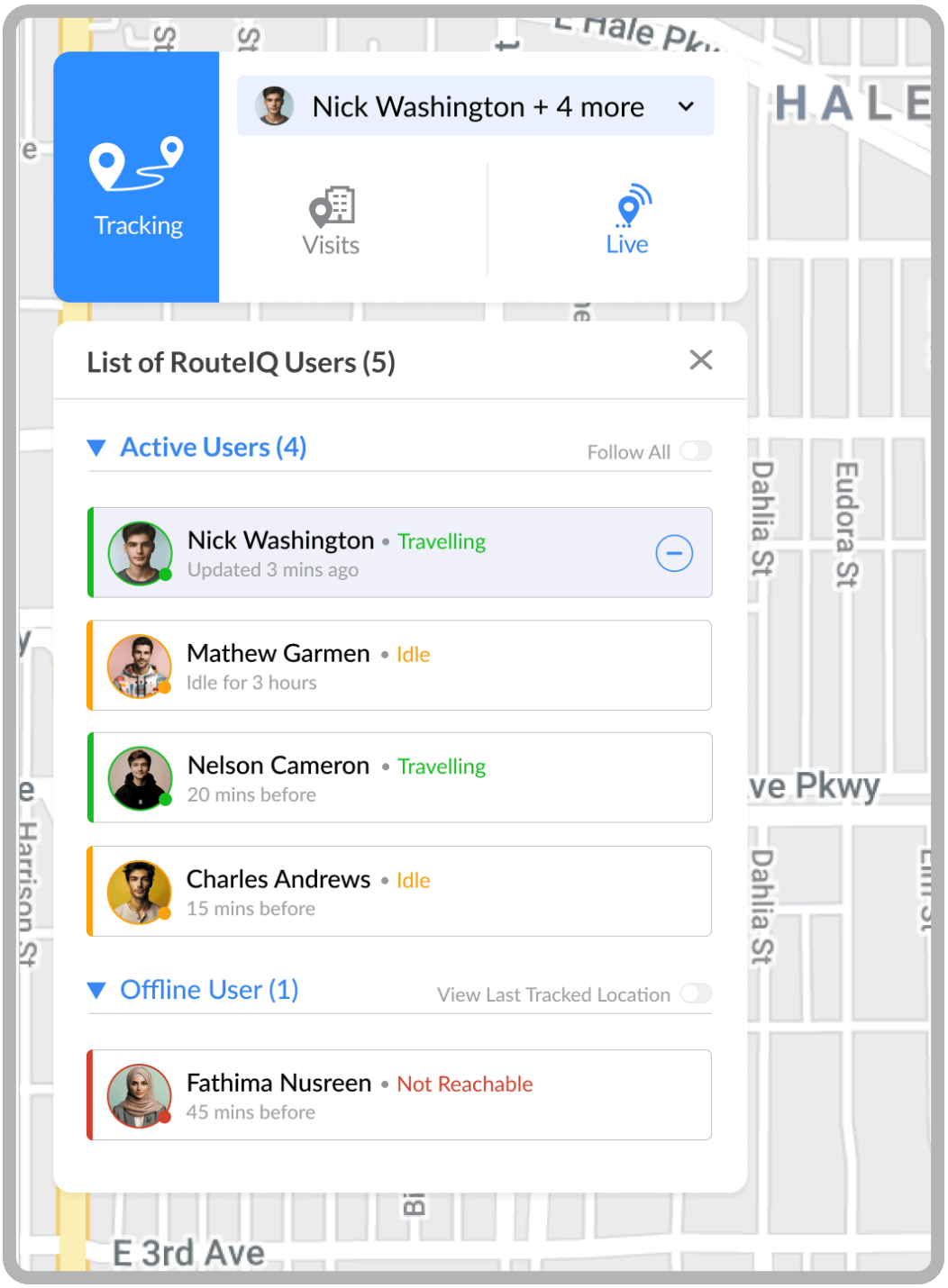
2. Selecting the tracking type



Shift Hours Based: This tracks the user during their assigned shift hours in Zoho CRM.
Route Status Based: This tracks the user when they own an in-progress route.
Always: This tracks the user all the time (24X7)

To use shift hours based tracking, shift hours or business hours must be setup in Zoho CRM.

3. An email with steps and activation link will be sent to the user to activate the RIQ LT Agent app.



List View

3. In the list view, you'll be able to see the users' list categorized based on their tracking state.

Tracking state tells you if the user's live location can be tracked at the moment.

Online means that the user's live location can be tracked.

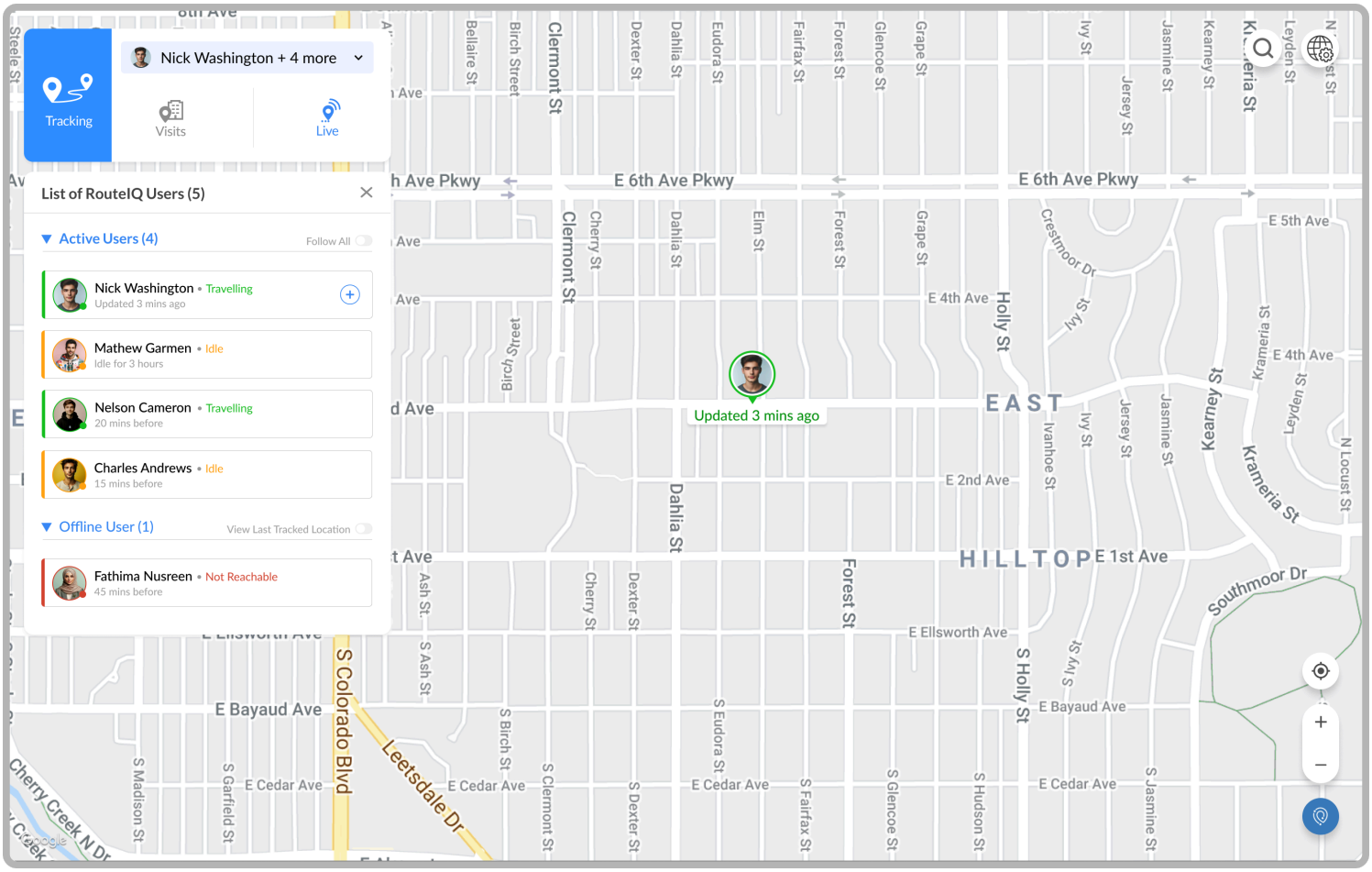
Offline means that the user's live location can't be tracked as the device is not reachable (due to lack of network, airplane mode, etc.), misconfigured, yet to be activated, etc.

Tracking status

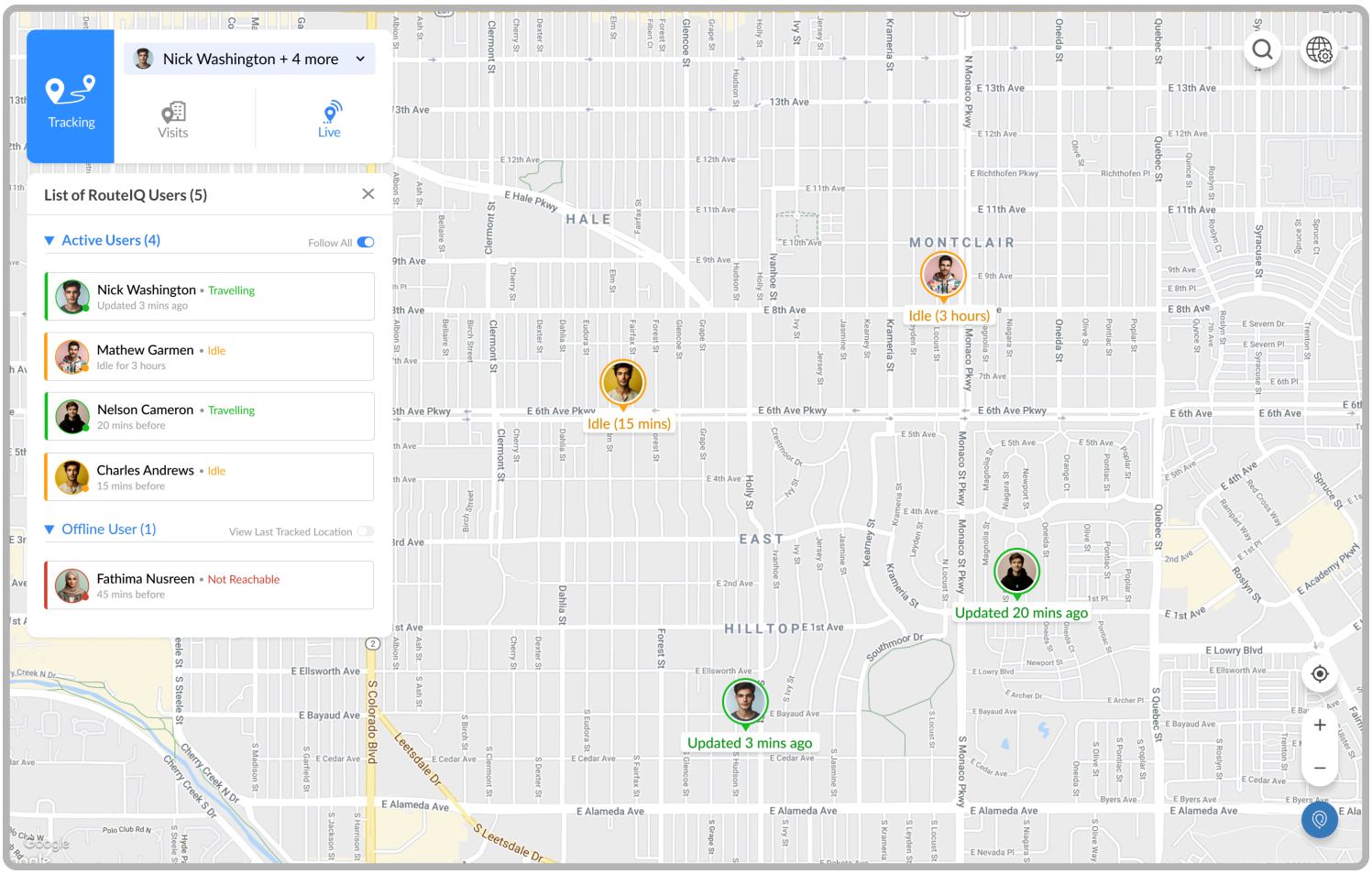
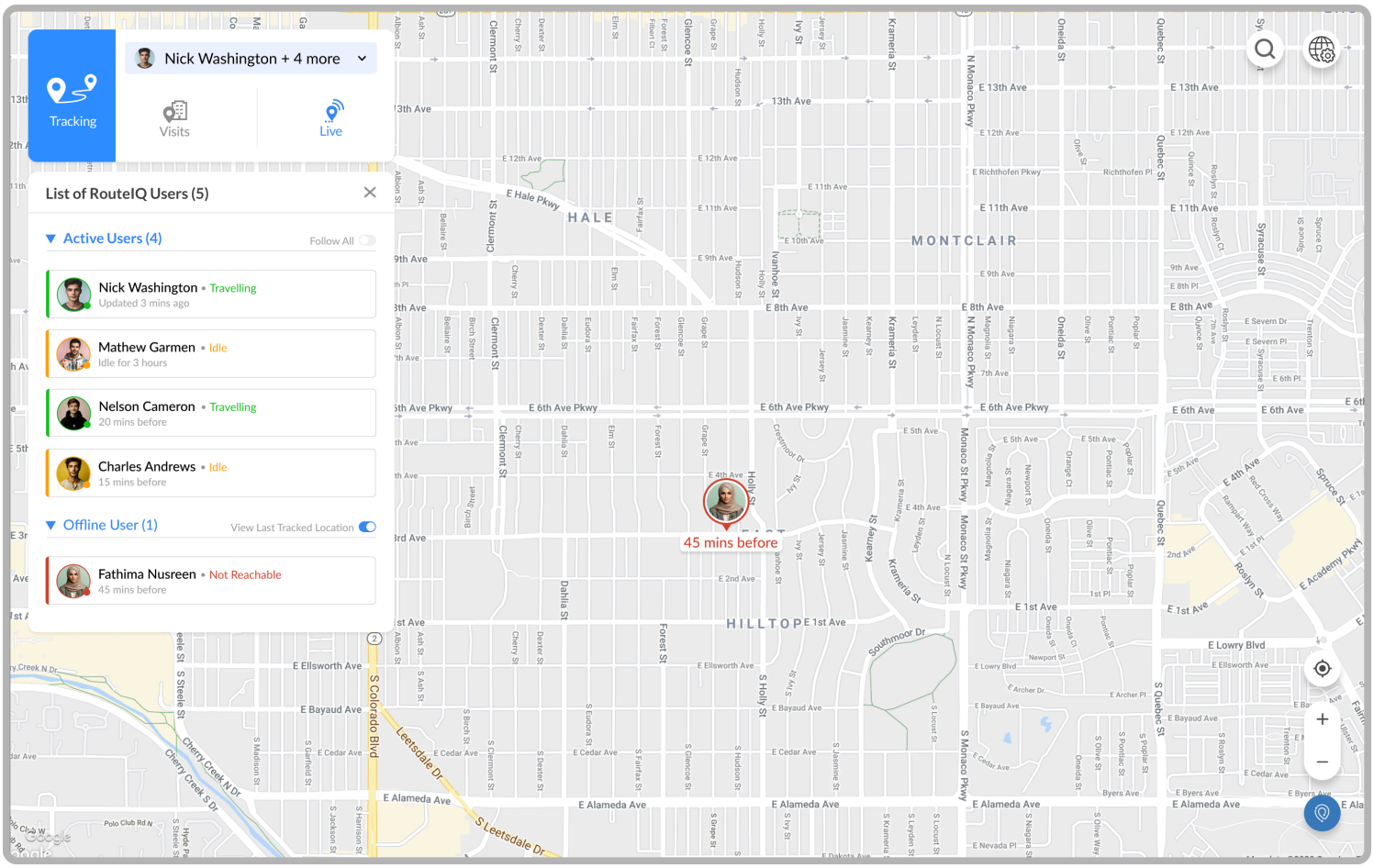
Tracking status (Traveling or Idle) tells you if the user is current travelling from one stop to another or idle at location (i.e. meeting a prospect)

Map View

4. If you want to track the location of a specific user, you can click the follow icon beside the user's name.



5. You want to track all the users simultaneously, you can click the follow all toggle.



6. You can view the previous tracked location of an offline user to get an idea of where they were.