

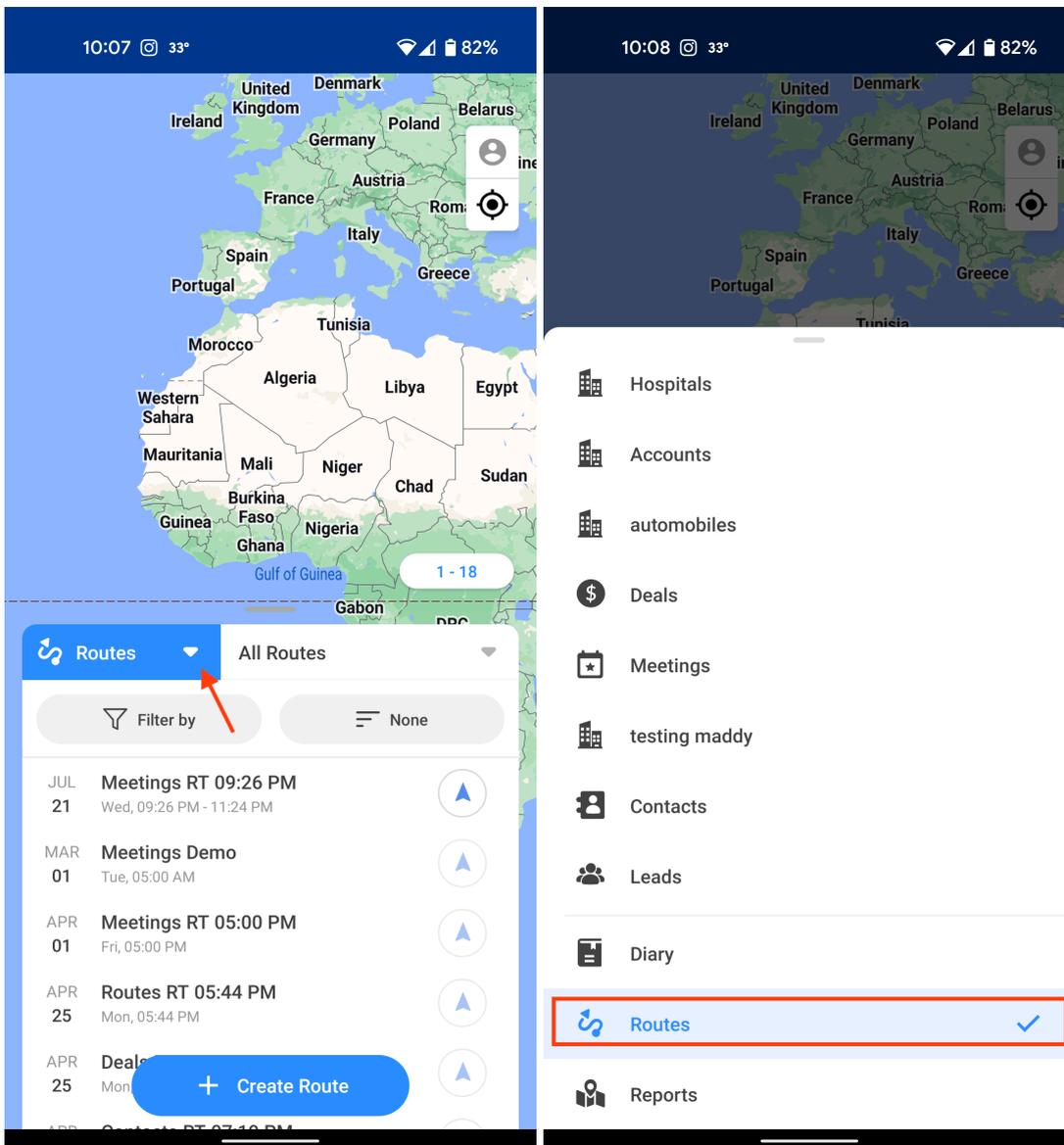


# Creating Routes - Mobile

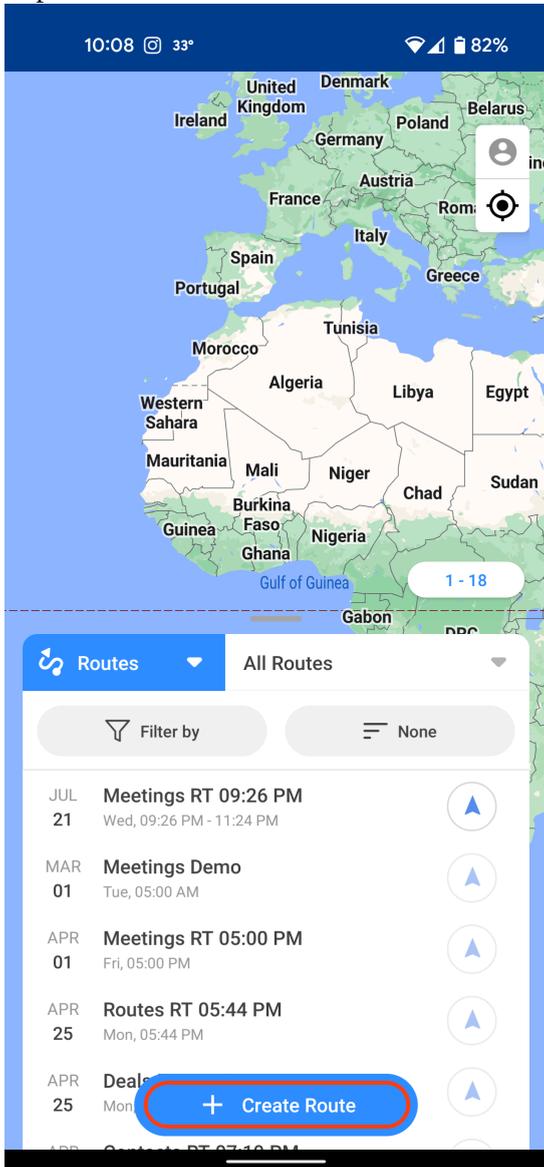
The *Route Planning* feature in RouteIQ helps you organize and plan your customer visits for your sales, service, or delivery activities. You can plan routes, modify them on the go, and make the most of your time.

## Opening the Route Planning Wizard

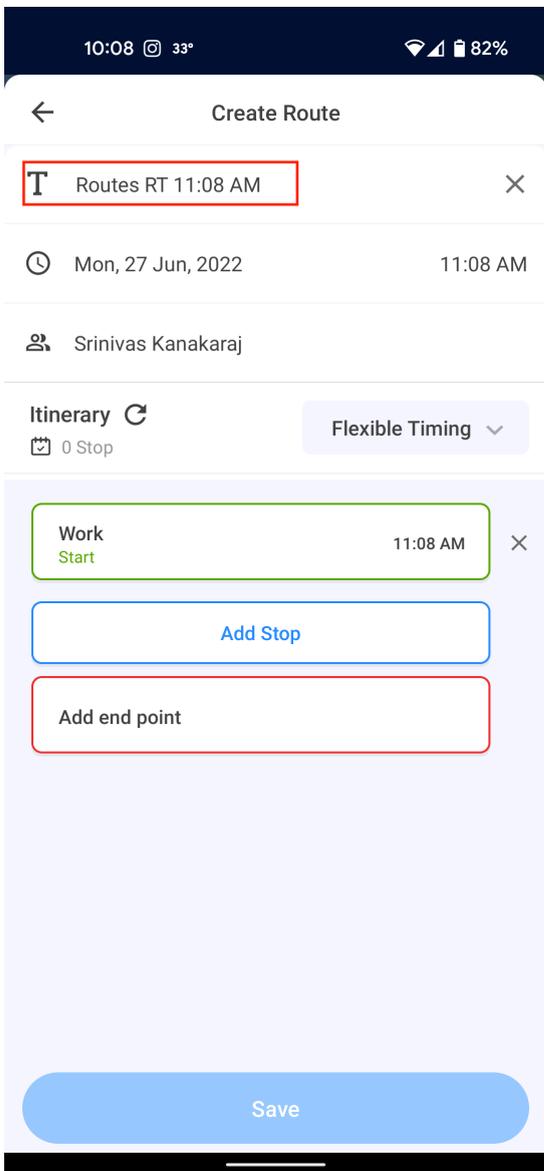
1. Tap on the current module, then select **Routes** from the list of Zoho CRM modules and RouteIQ modules.



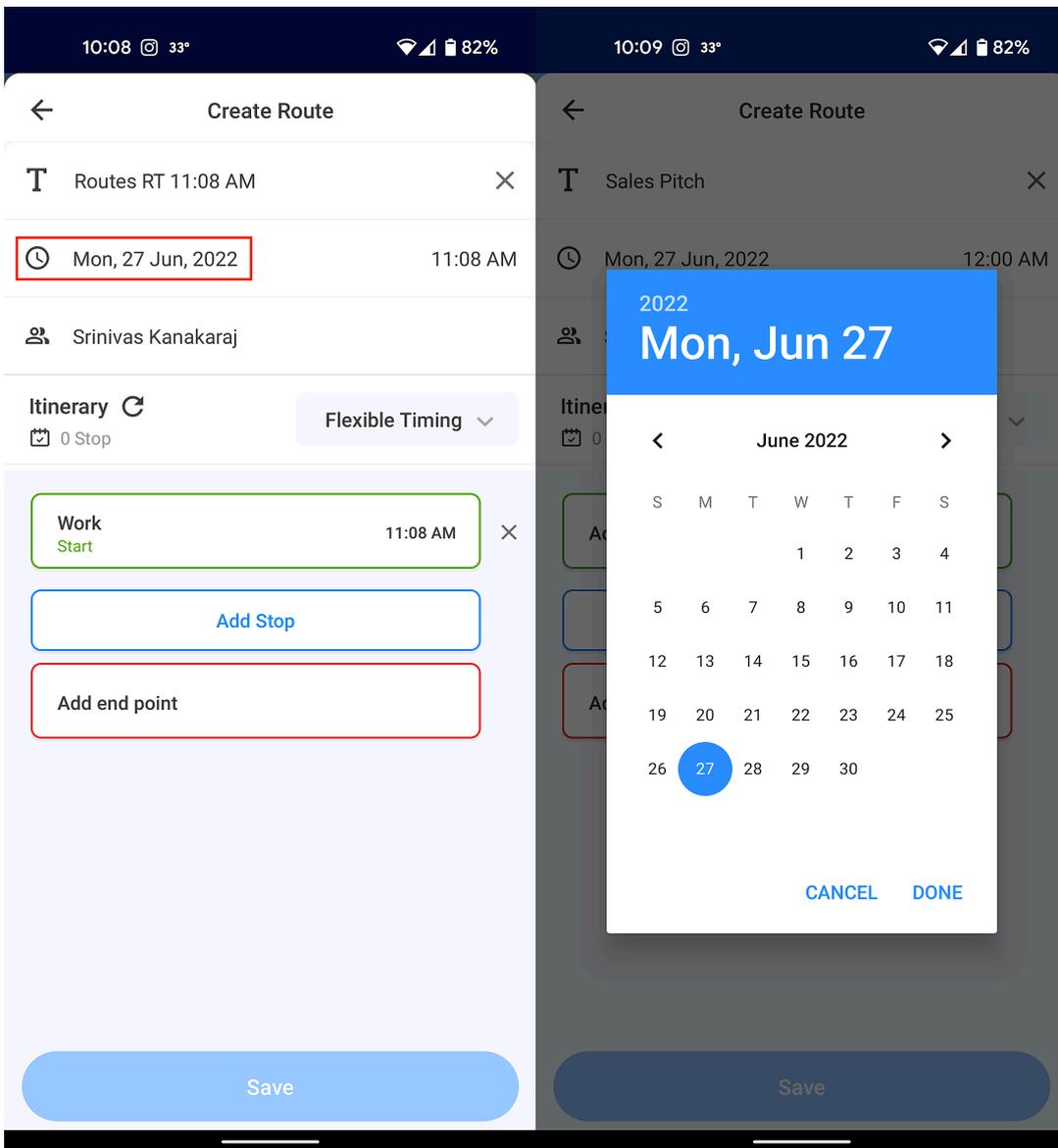
2. Tap on the **Create Route** icon in the bottom of the screen. This will open the route planner wizard.



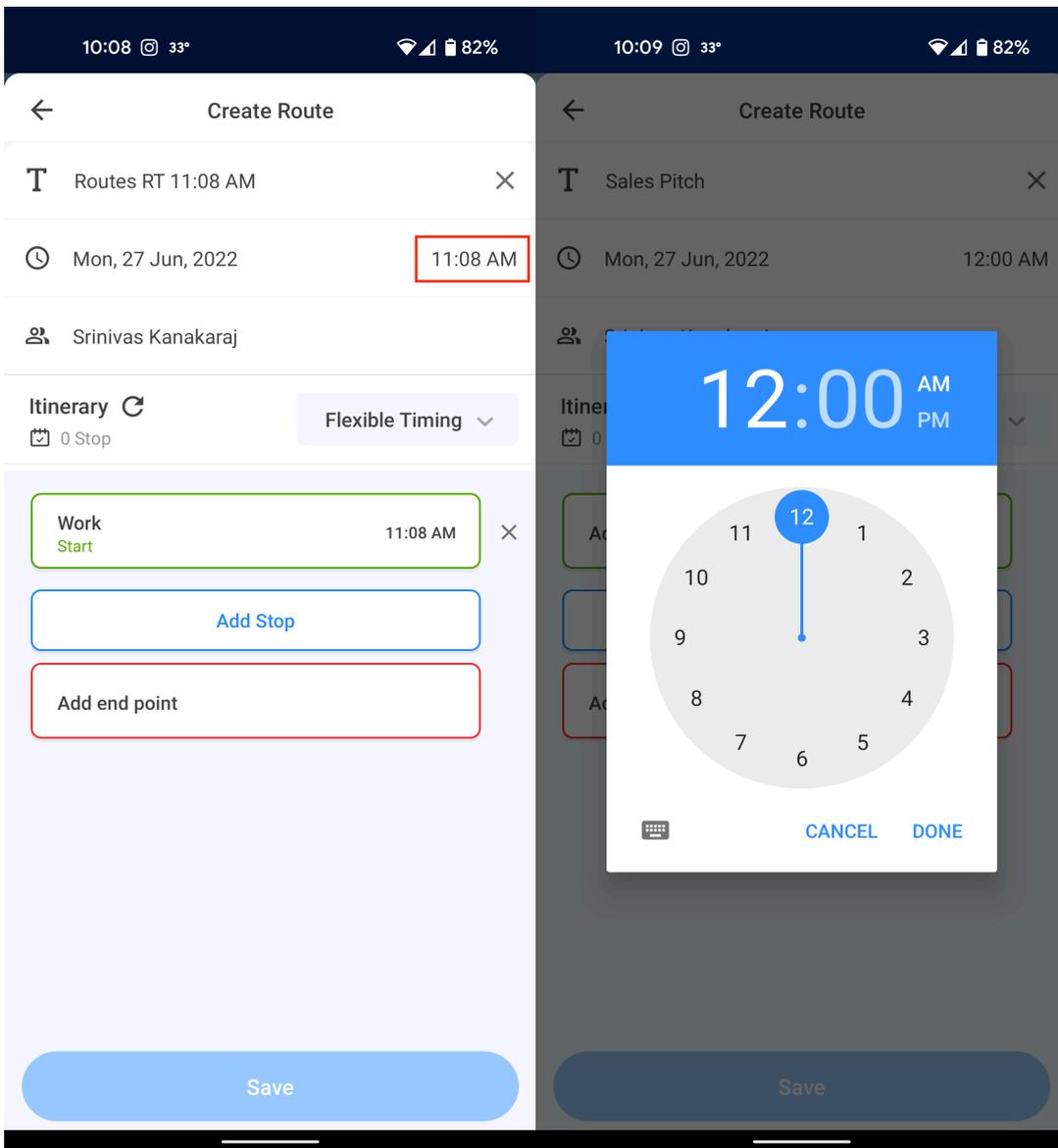
3. Tap on the route name and enter a new name for the route.



4. Tap on the start date field and provide the starting date.



5. Tap on the start time field and provide the starting time.

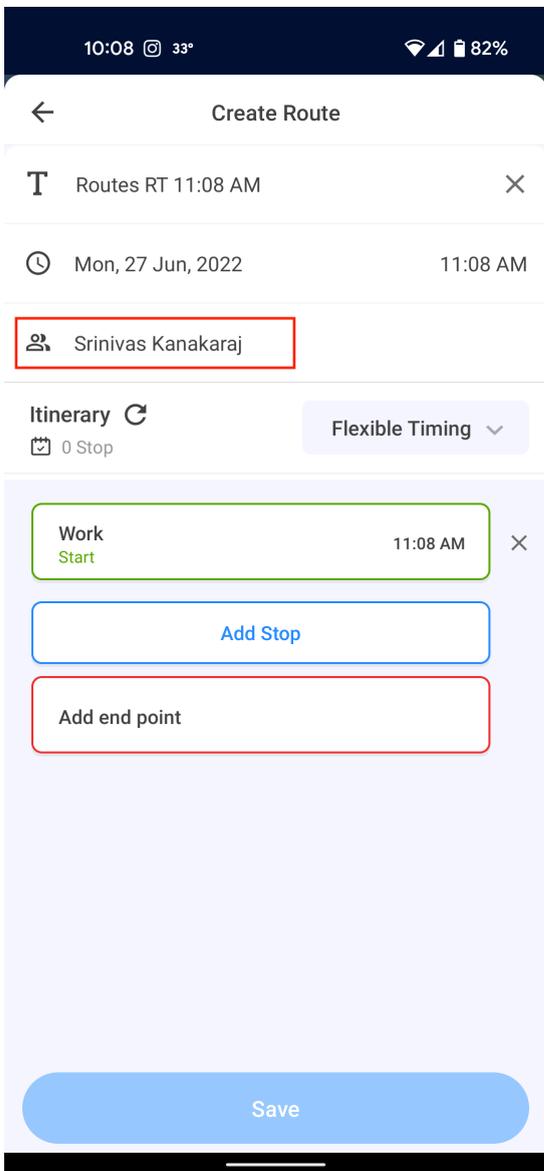


**Limitation:** RouteIQ supports up to 25 stops, including start and end points.

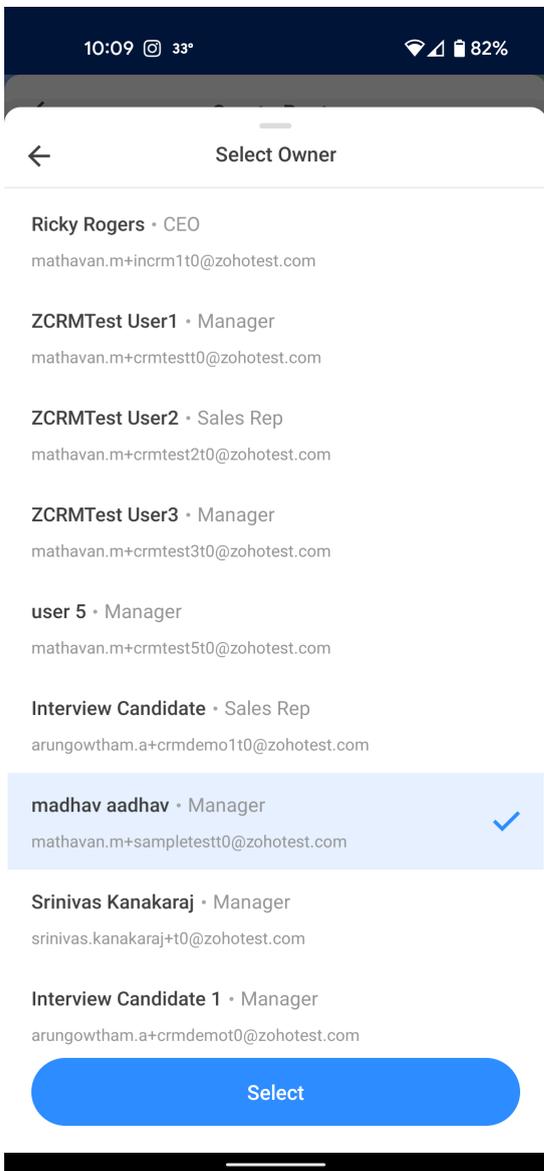
**Note:** The route path for completed routes will be available for one month after the route completion date.

## Assigning Routes

1. Tap on the current **route owner's** name below the start date.

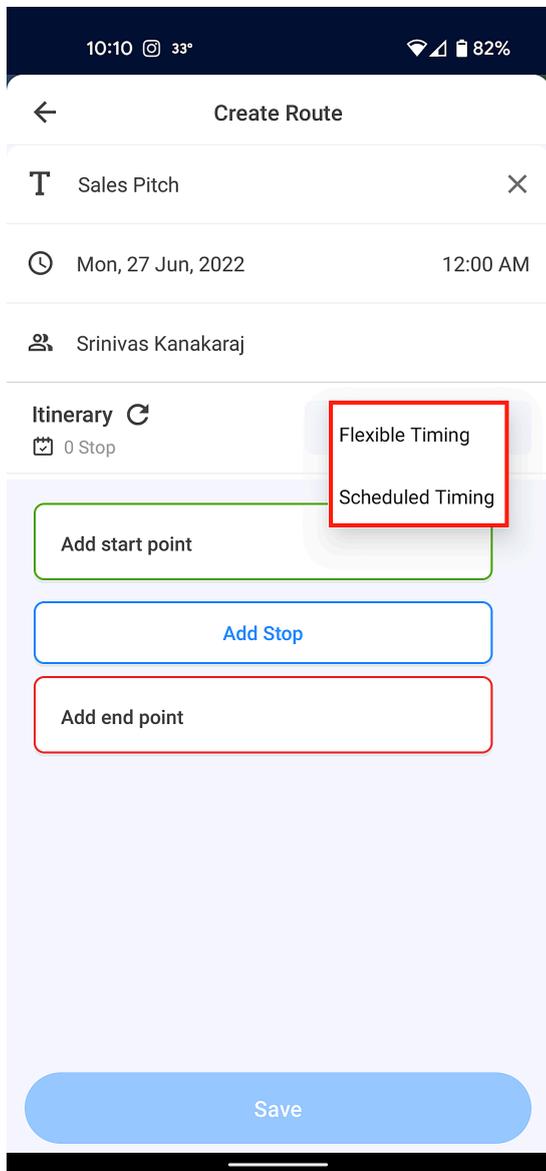


2. Select the user to whom you want to assign the route.



## Route Type

RouteIQ offers two types of timings for routes: *scheduled* and *flexible*.

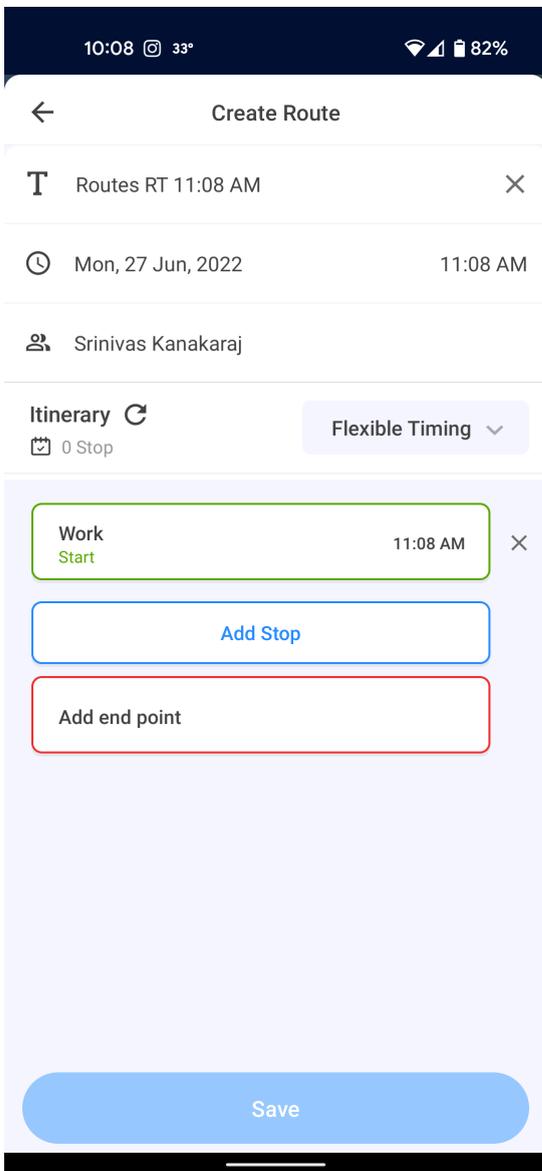


- **Scheduled Timing** - Create routes by providing fixed timings for the meetings. The order of stops is sorted based on the start time of the meetings.
- **Flexible Timing** - Create routes by providing just the duration of the meeting. The order of stops is optimized to travel the least distance/duration.

You can choose between scheduled timing and flexible timing by tapping on the **Route Type** dropdown and choosing the relevant option.

## Itinerary

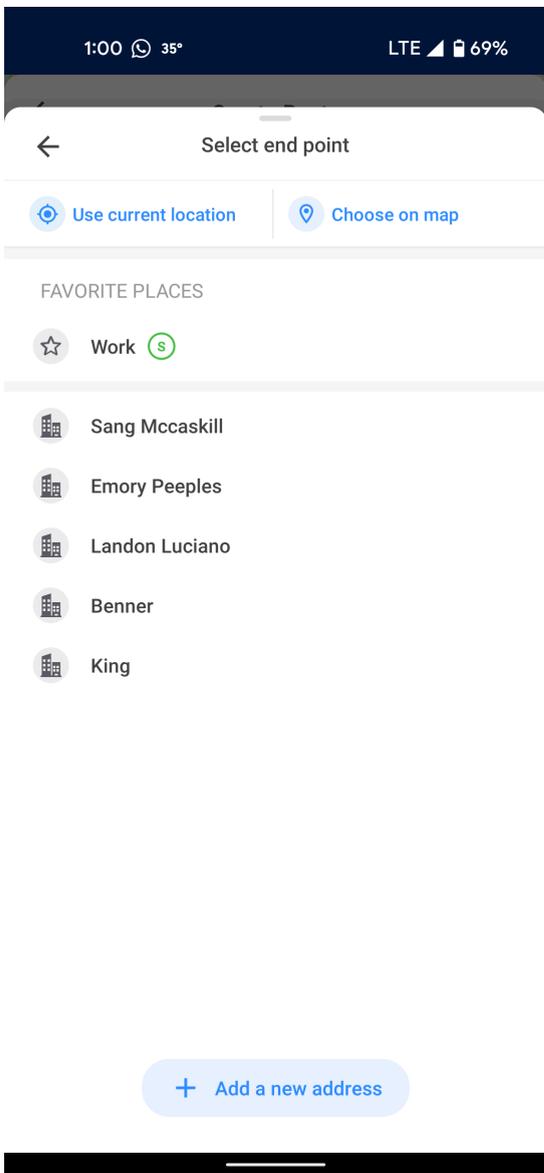
The number of appointments and the total duration of the appointments is displayed near itinerary. You can tap on the **reset icon** to restart planning the route.



## Adding Start and end location

Tap the **Add start point** button and provide the start point; use your current location, choose a location on the map or use a favorite place as your start point.

You can follow the same steps to add the end point.

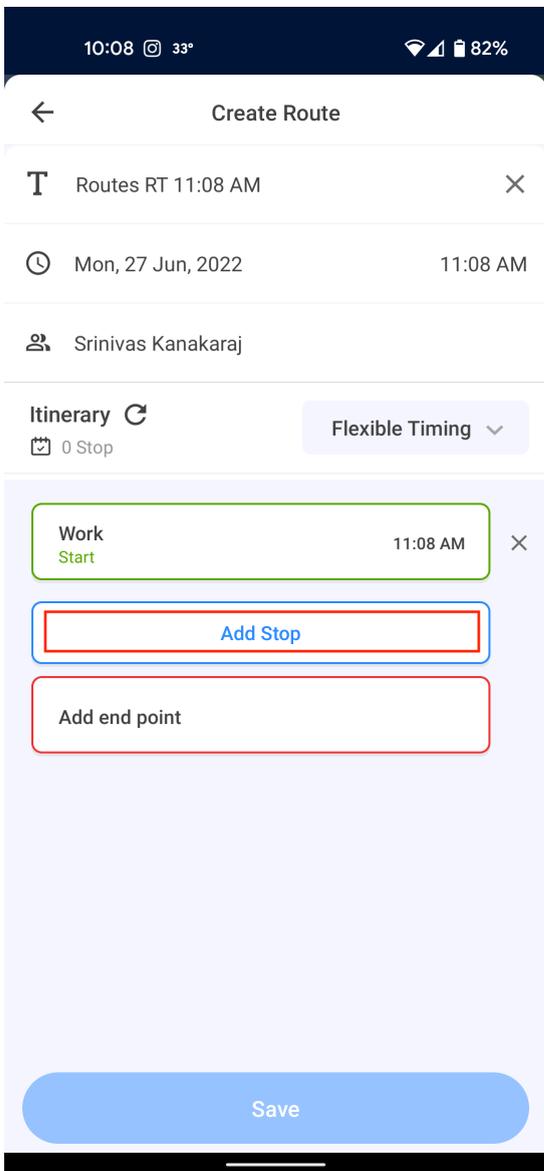


## Note:

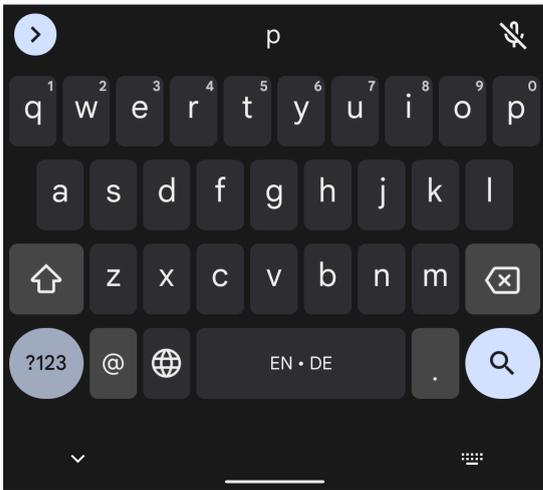
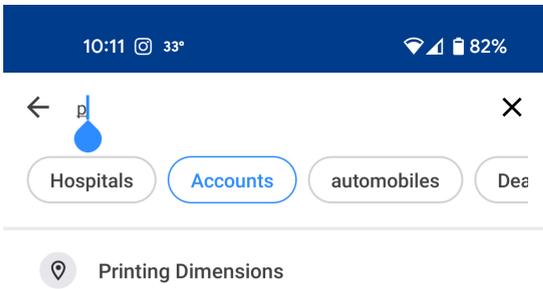
- For scheduled timing, the start and end points are optional.
- For flexible timing, both start and end points must be provided.

## Adding stops to your route

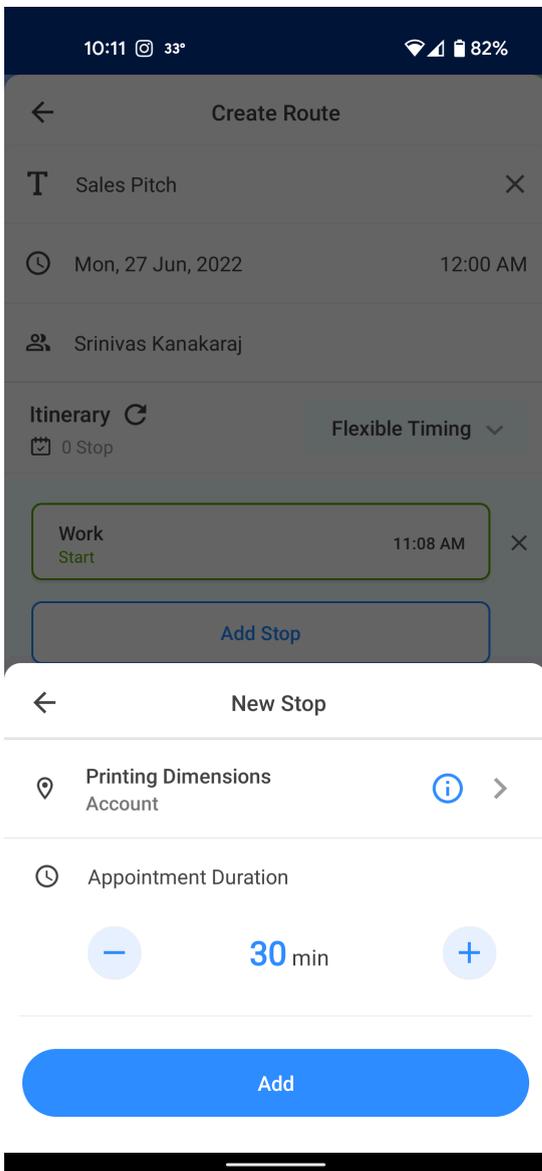
1. Tap on the **Add Stop** button.



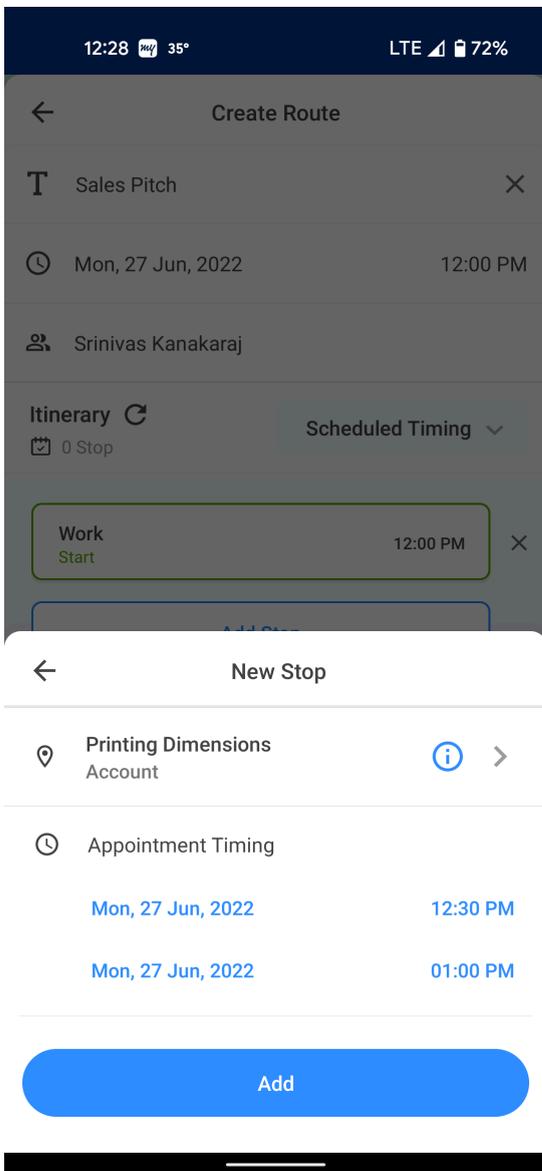
2. Swipe to view the integrated Zoho CRM modules and select the desired module whose record you want to visit.



3. For flexible appointment, provide the appointment duration.



4. For scheduled appointment, provide the *from* and *to* timing for the appointment.



5. Click **Add** to add the record to the route wizard.
6. Repeat the process to add all the required records.
7. Click **Create**.

**Note:** The timing of a scheduled stop from the meetings module is fetched from Zoho CRM. If you modify the appointment timing in RouteIQ, the change will be updated in Zoho CRM.

**Note:** Within a day, multiple stops for a record can be set only for *scheduled type* routes and isn't supported for records from the meetings module.

## Rearranging stops

1. Long-press the stop which you would like to rearrange.
2. Drag and drop the stop in the required position.

**Note:** The optimization is removed when the stop's position is manually changed.

← Accounts RT 02:00 PM  
2 h 30 min at (5 Stops) | 2 h 45 min for (65.56 miles)

● Work 02:00 PM

25 min (10.14 miles)

① Sang Mccaskill 02:25 PM - 02:55 PM



23 min (7.39 miles)

② Landon Luciano 03:18 PM - 03:48 PM

36 min (15.97 miles)

③ King 04:25 PM - 04:55 PM

36 min (14.7 miles)

④ Emory Peebles 05:31 PM - 06:01 PM

7 min (2.55 miles)

⑤ Benner 06:08 PM - 06:38 PM

36 min (14.8 miles)

● Work 07:15 PM

↩ Navigate