Visualizing Zoho CRM modules and views

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
- RouteIQ exclusive modules

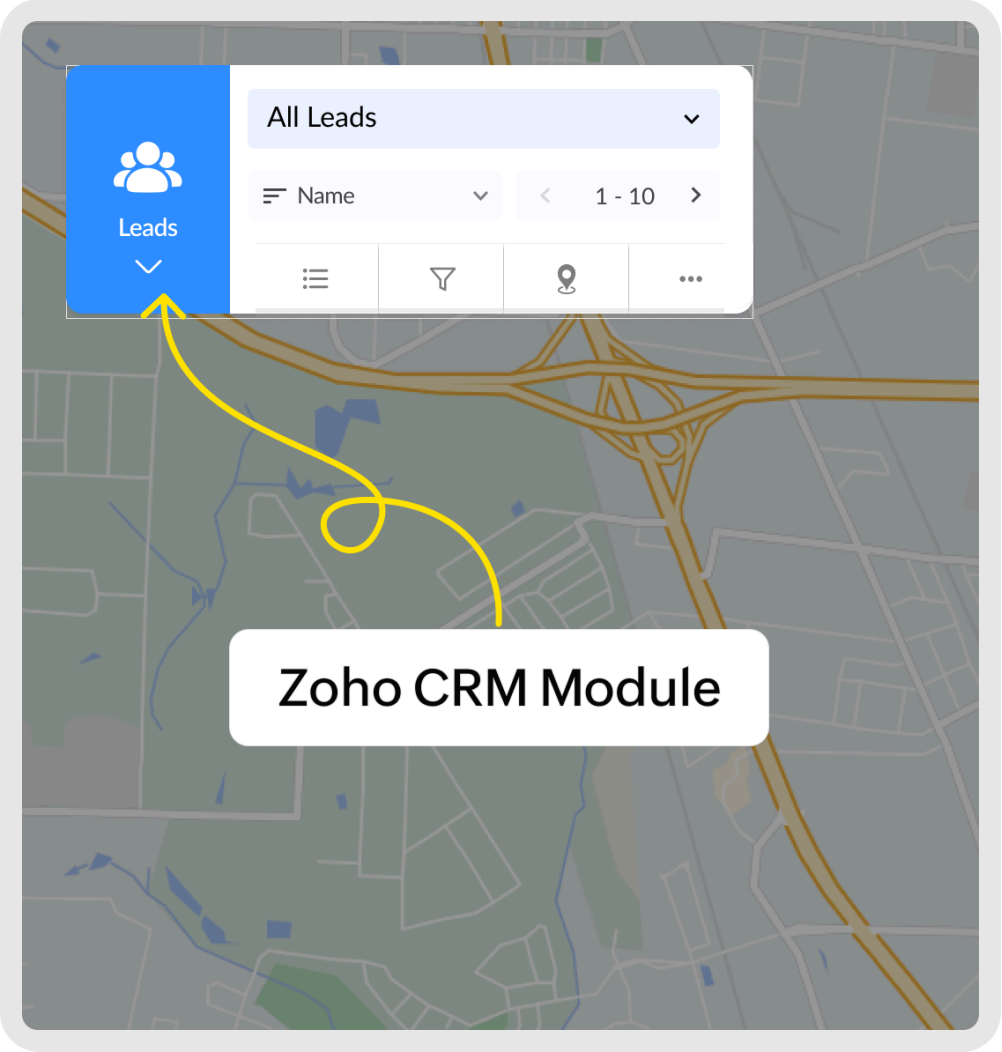
In the RouteIQ window, the left most widget shows which module is currently chosen.

To view the list of both integrated CRM modules and RouteIQ exclusive modules, click on the arrow right below the current module icon. (Learn how to integrate RouteIQ with Zoho CRM modules)

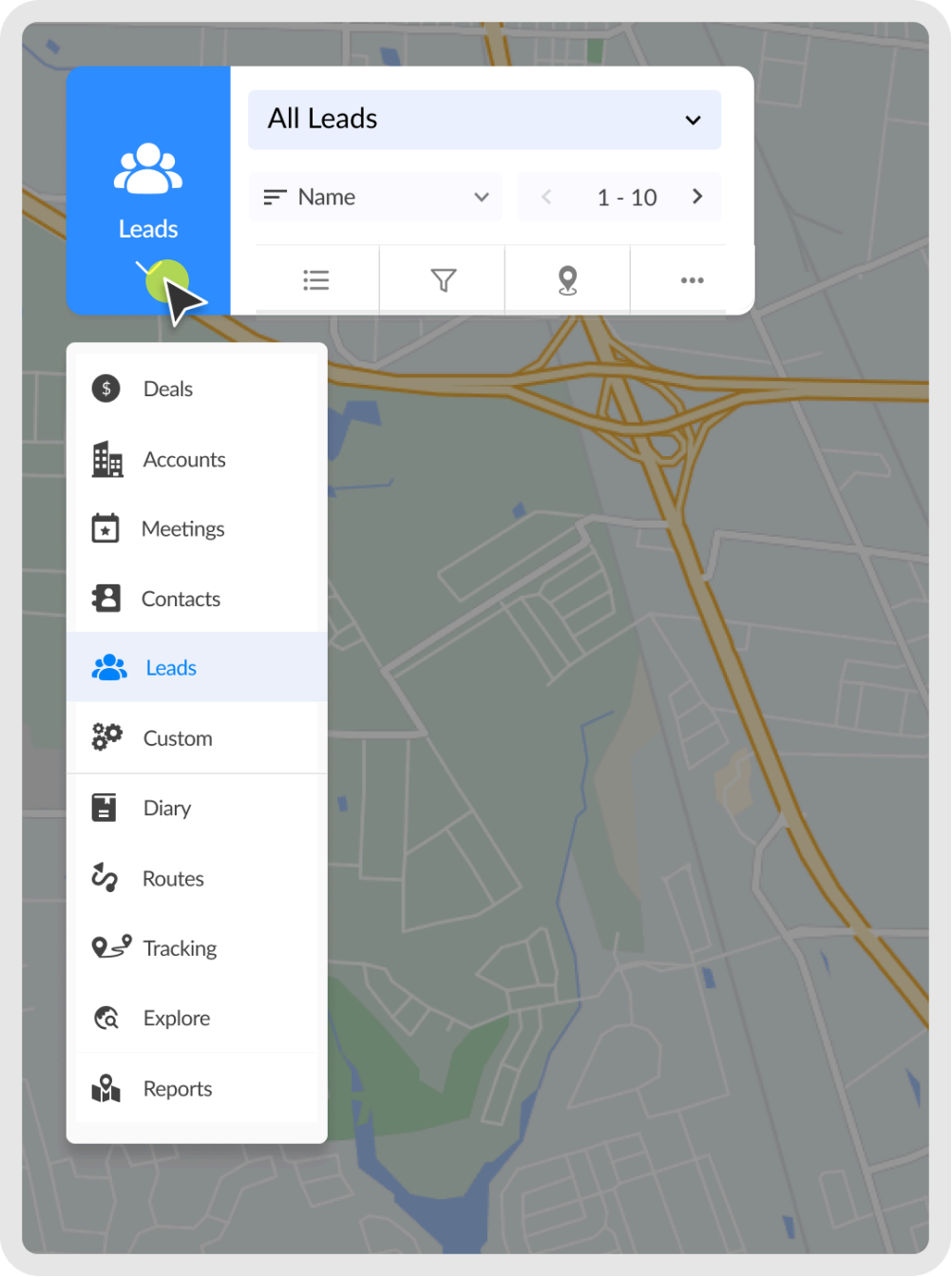
The arrow appears when you hover over the current module.

Changing Zoho CRM module

1. Click the drop-down button that appears when you hover over the current module



2. Click on the required CRM module to visualize the data on the map.

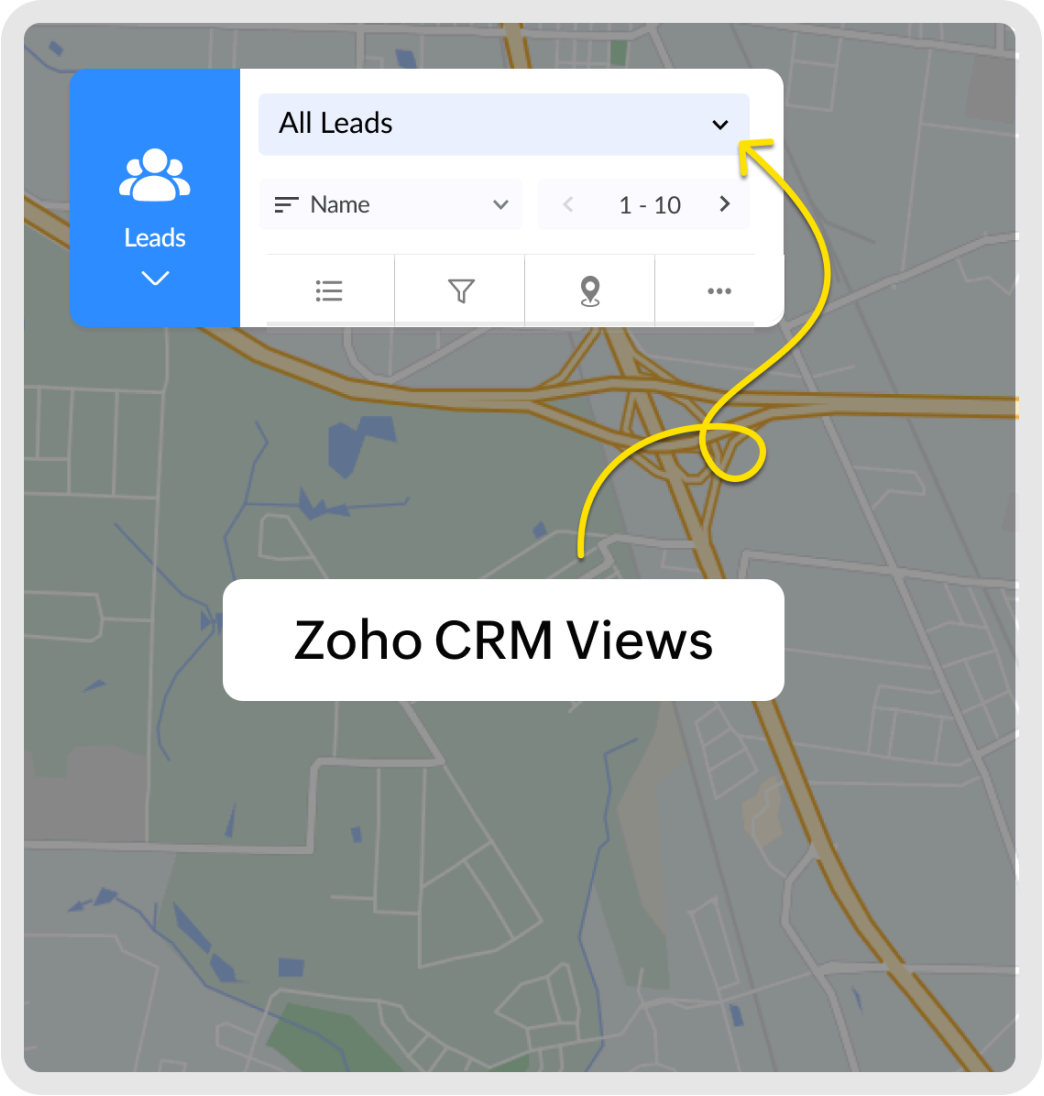


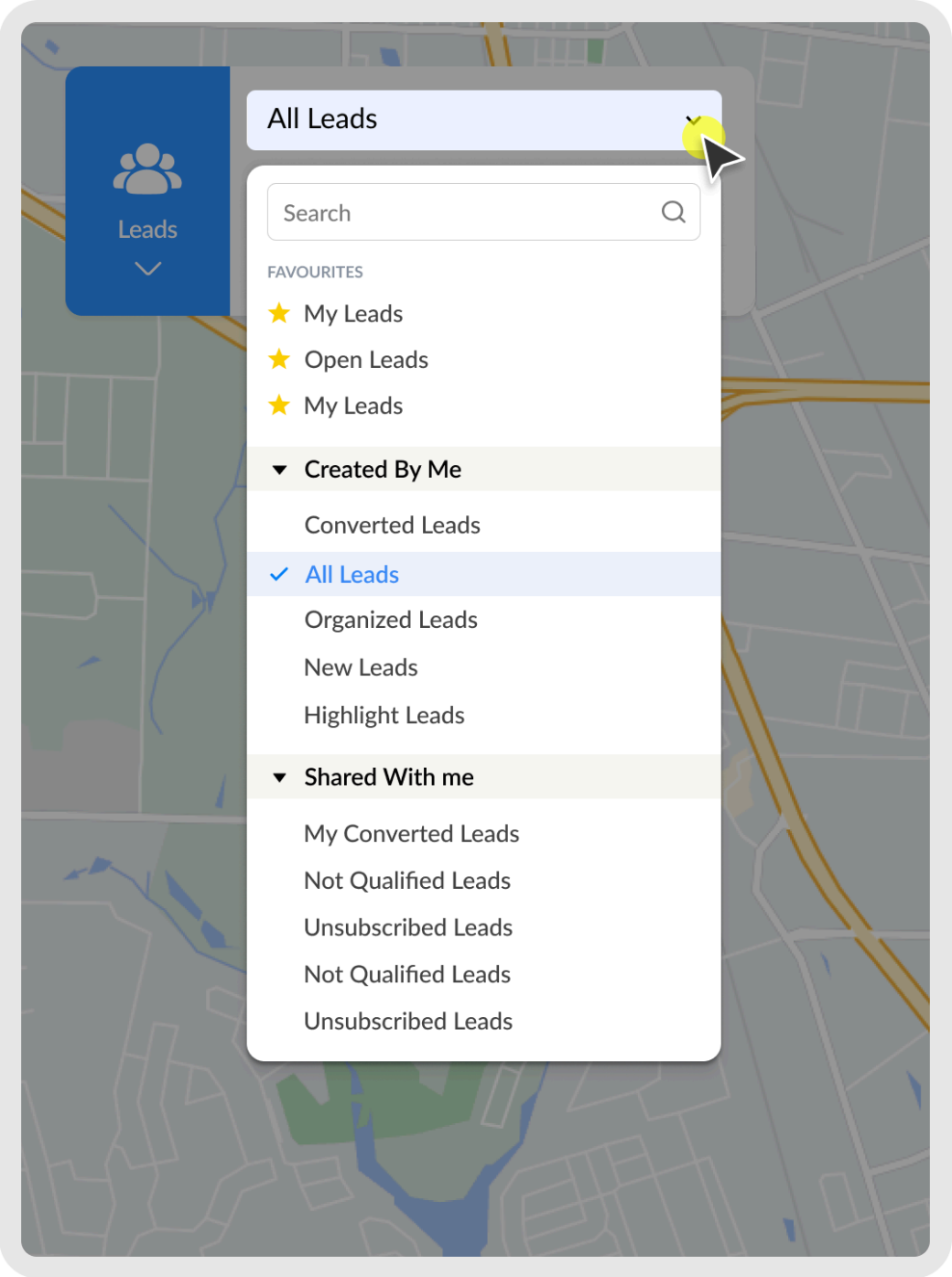
Views

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. Click on the arrow beside the Views field in the *RouteIQ* window. This will list all the integrated views of the module.


Leads
All Leads
Name
1 - 10
Zoho CRM Views

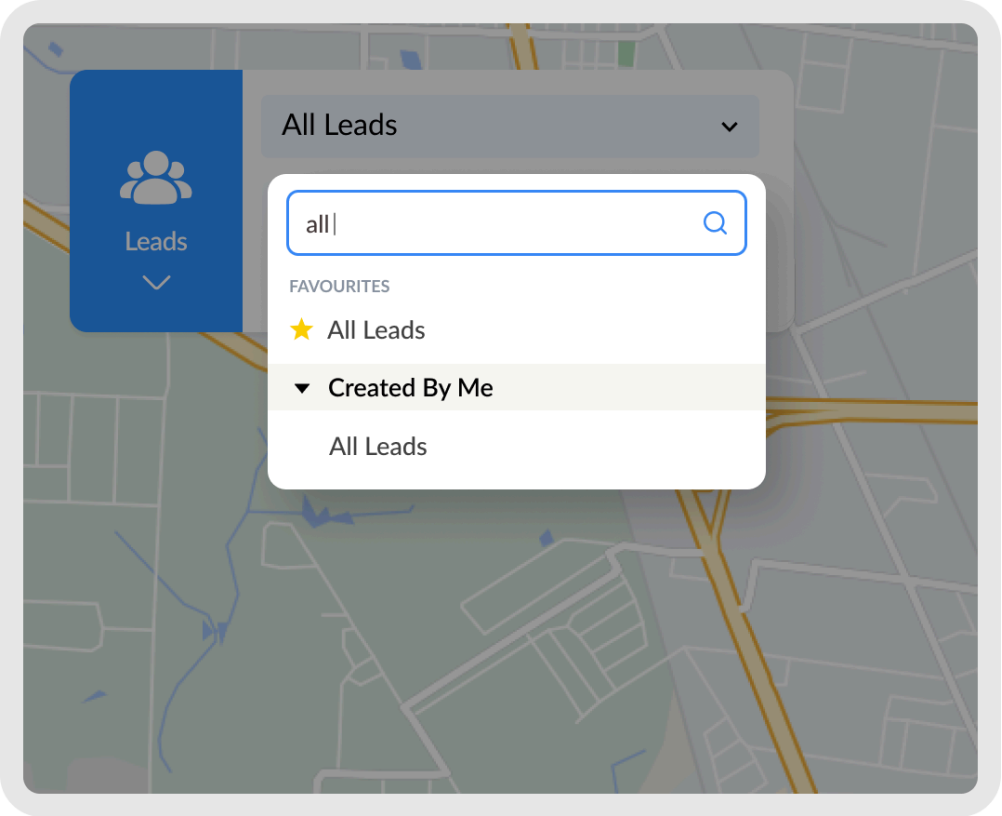


Similar to Zoho CRM, views are categorized as

- favorites
- created by me
- shared with me
- public views
- other user’s view.

Note: By default, 10 views from each category are displayed.

2. If you want to see the views that aren't listed, you can search for the desired view or click Show All to see all the views.



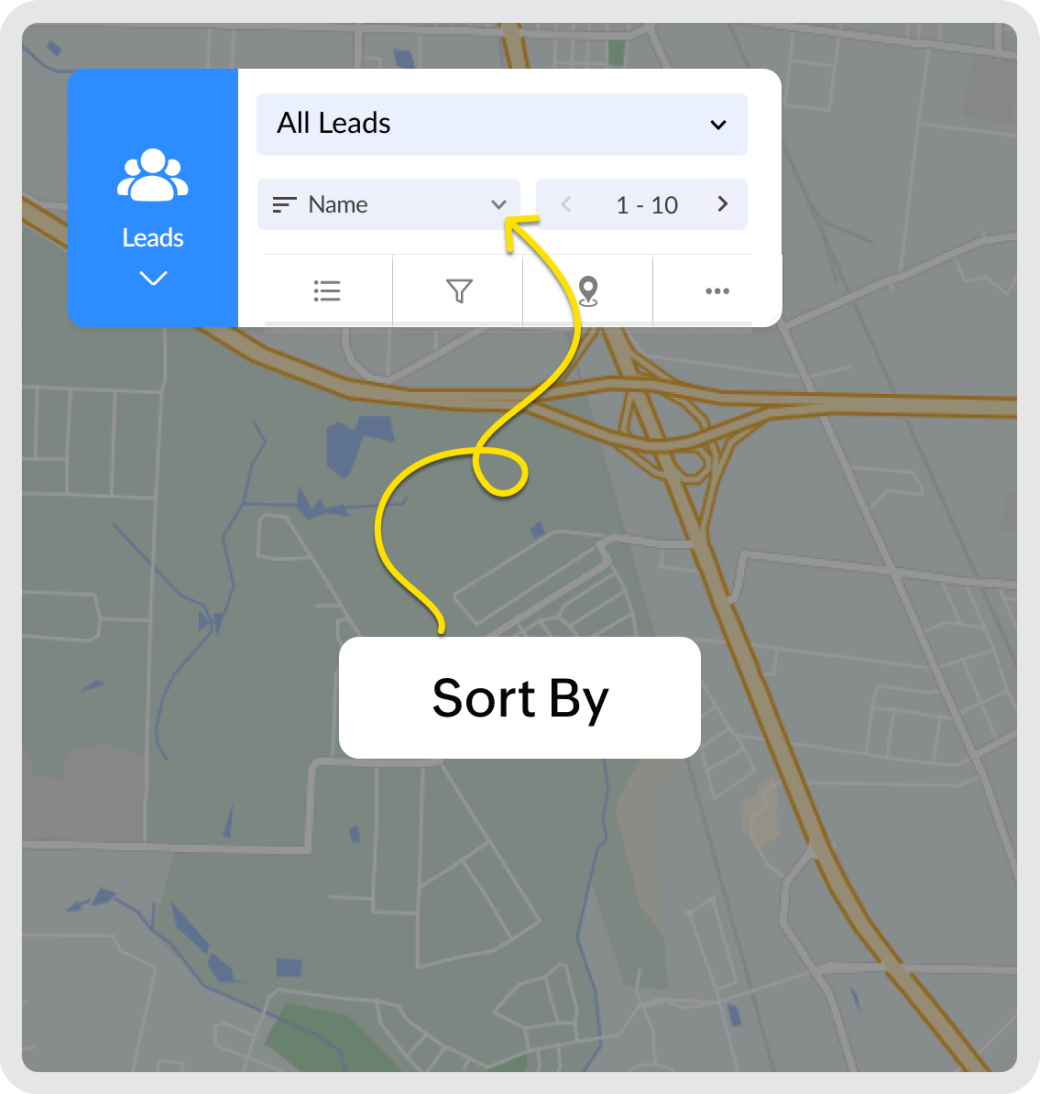
Map Visualization comes with many options to handle the vast number of records from the chosen CRM module. The options are explained below.

Sort By

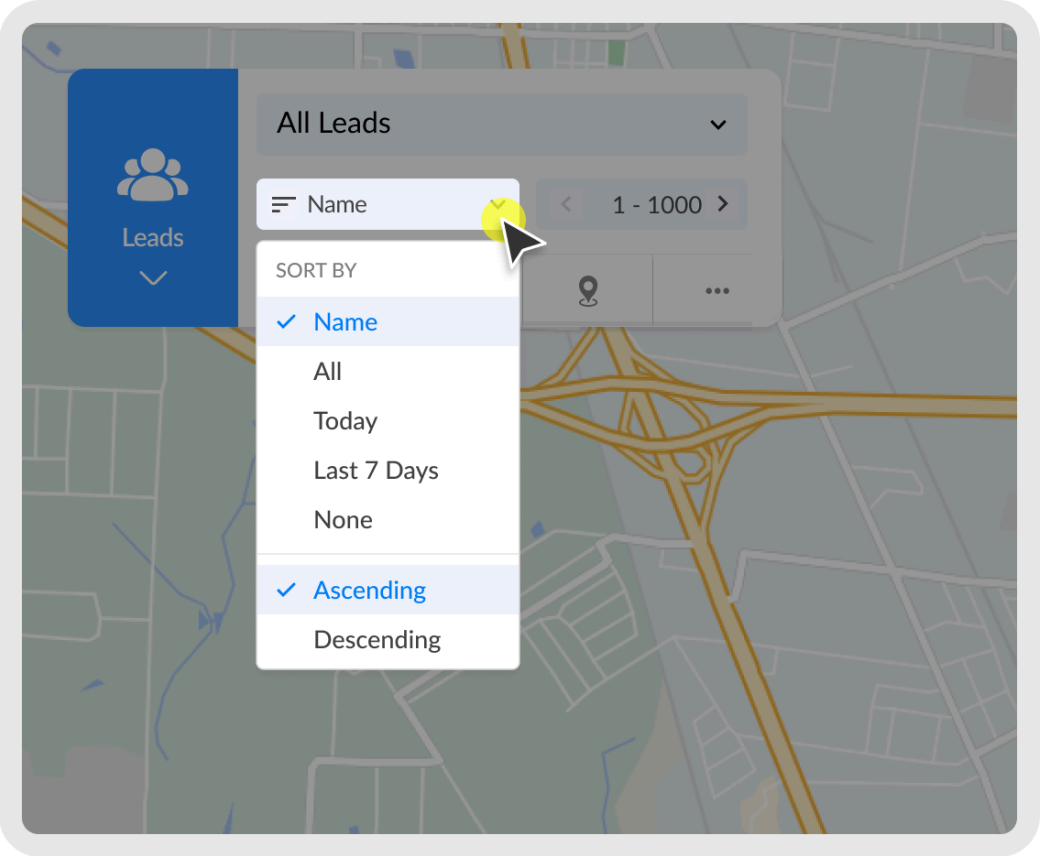
The Sort By tool allows you to rearrange records in the list and map based on a required order (ascending or descending) based on a field in the module.

Sorting records

1. Click on the **Sort By** drop-down.



2. Click the field you want to sort the records by and select the order of sorting (ascending or descending)

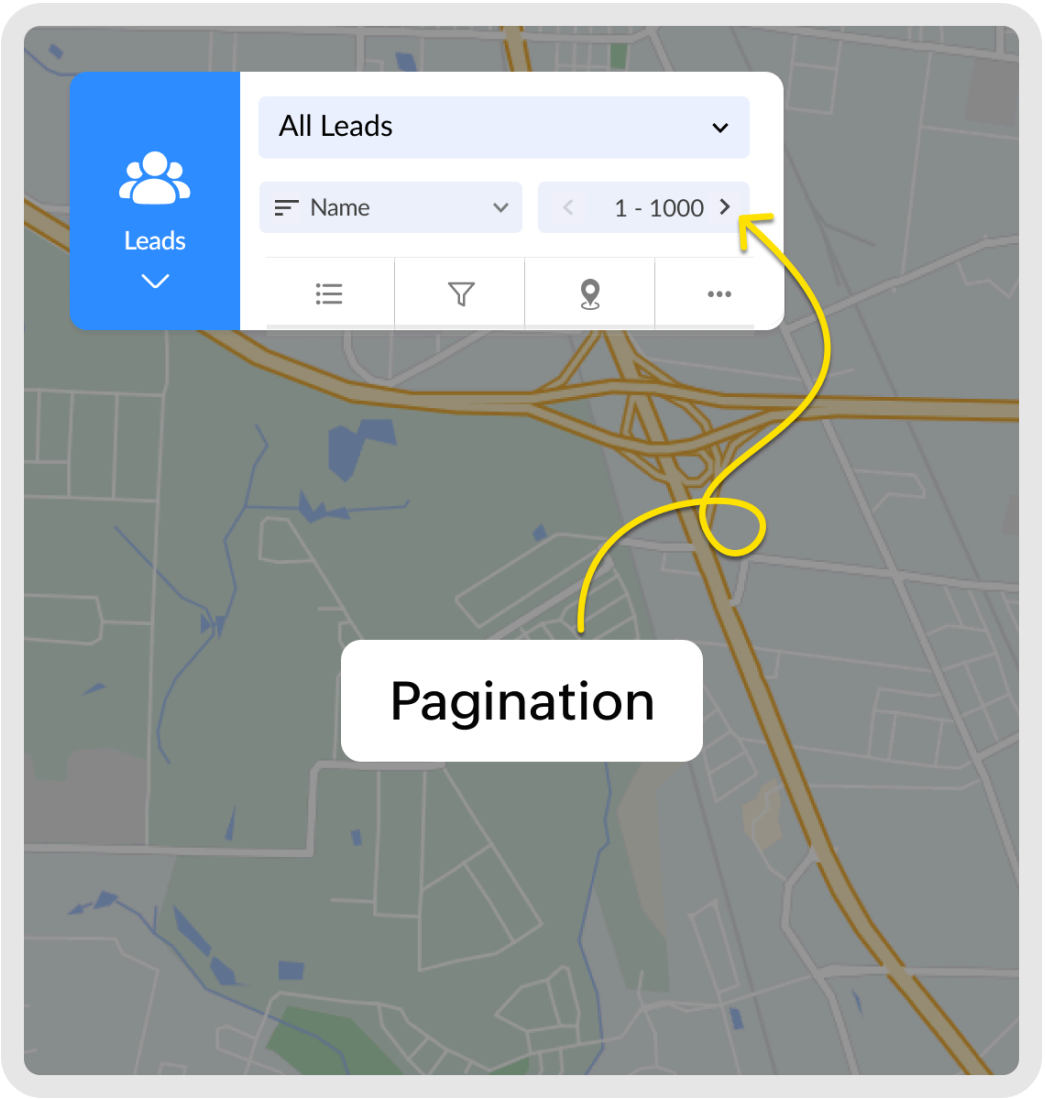


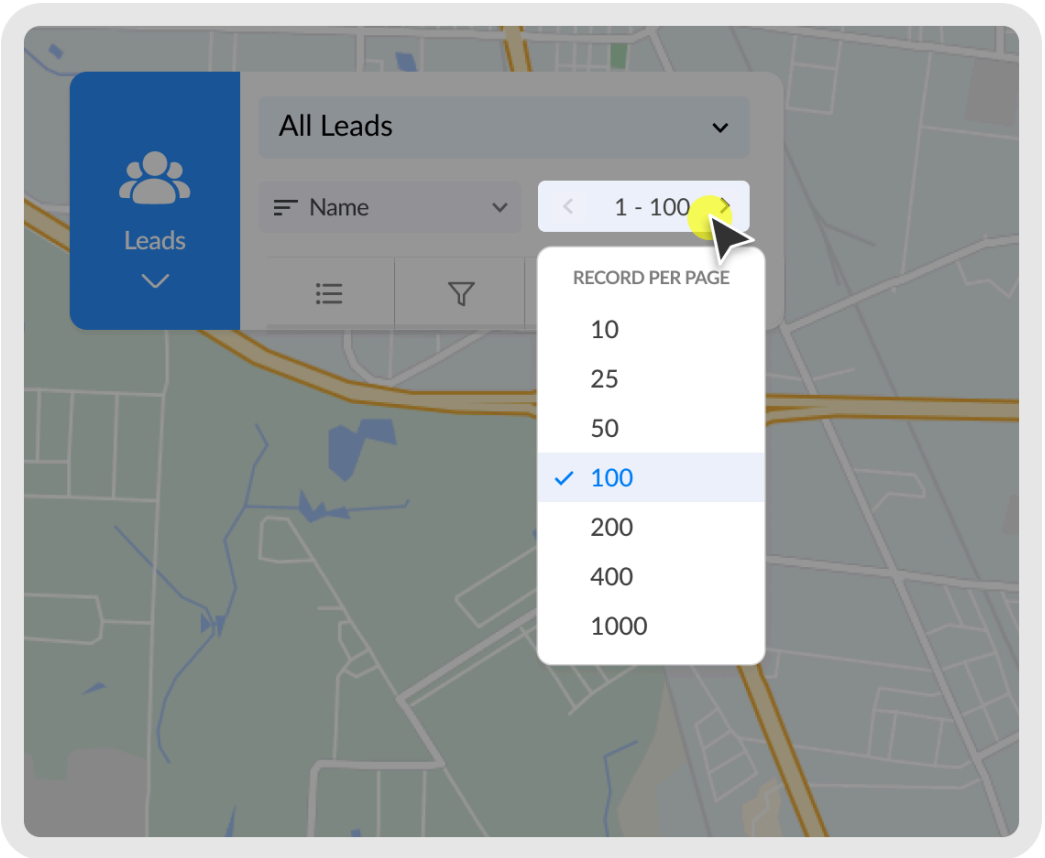
Pagination

You can switch between the next or previous set of records by clicking on the arrows near the pagination option.

You can increase the number of records listed by clicking on the pagination option and choosing the required number of records.

Note: Up to 1000 records can be visualized at once.


All Leads
Name
1 - 1000
Leads
Pagination

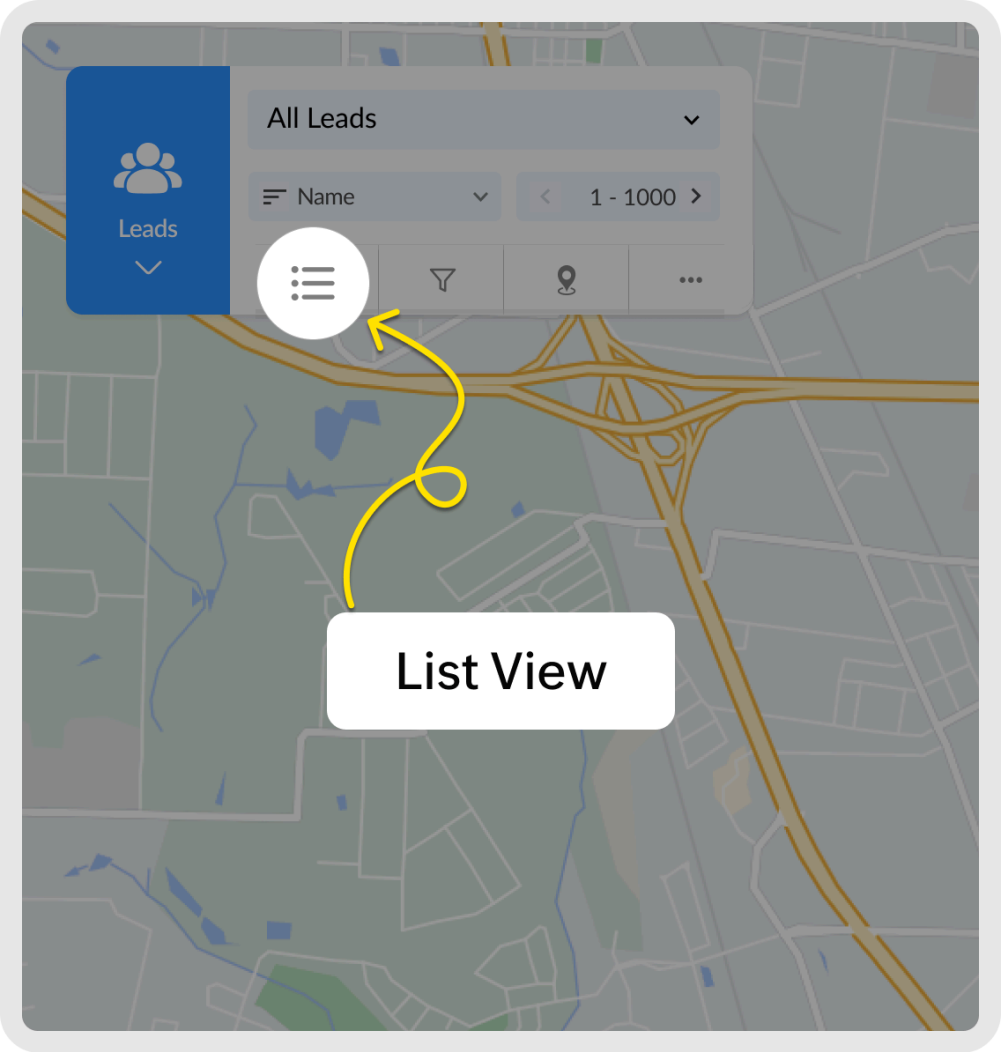

All Leads
Name
1 - 100
Leads
RECORD PER PAGE
10
25
50
100
200
400
1000

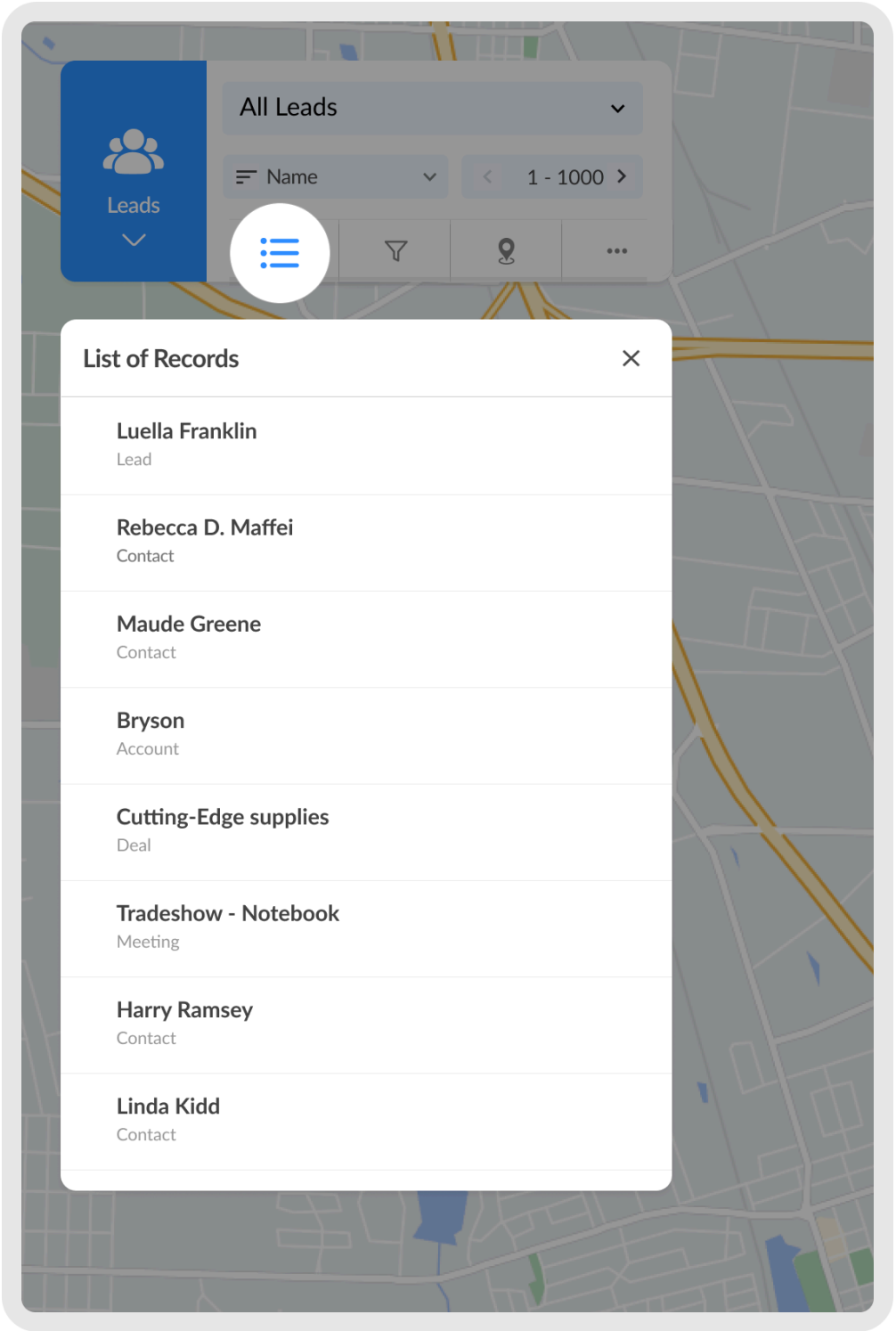
List View

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

Viewing records in List View

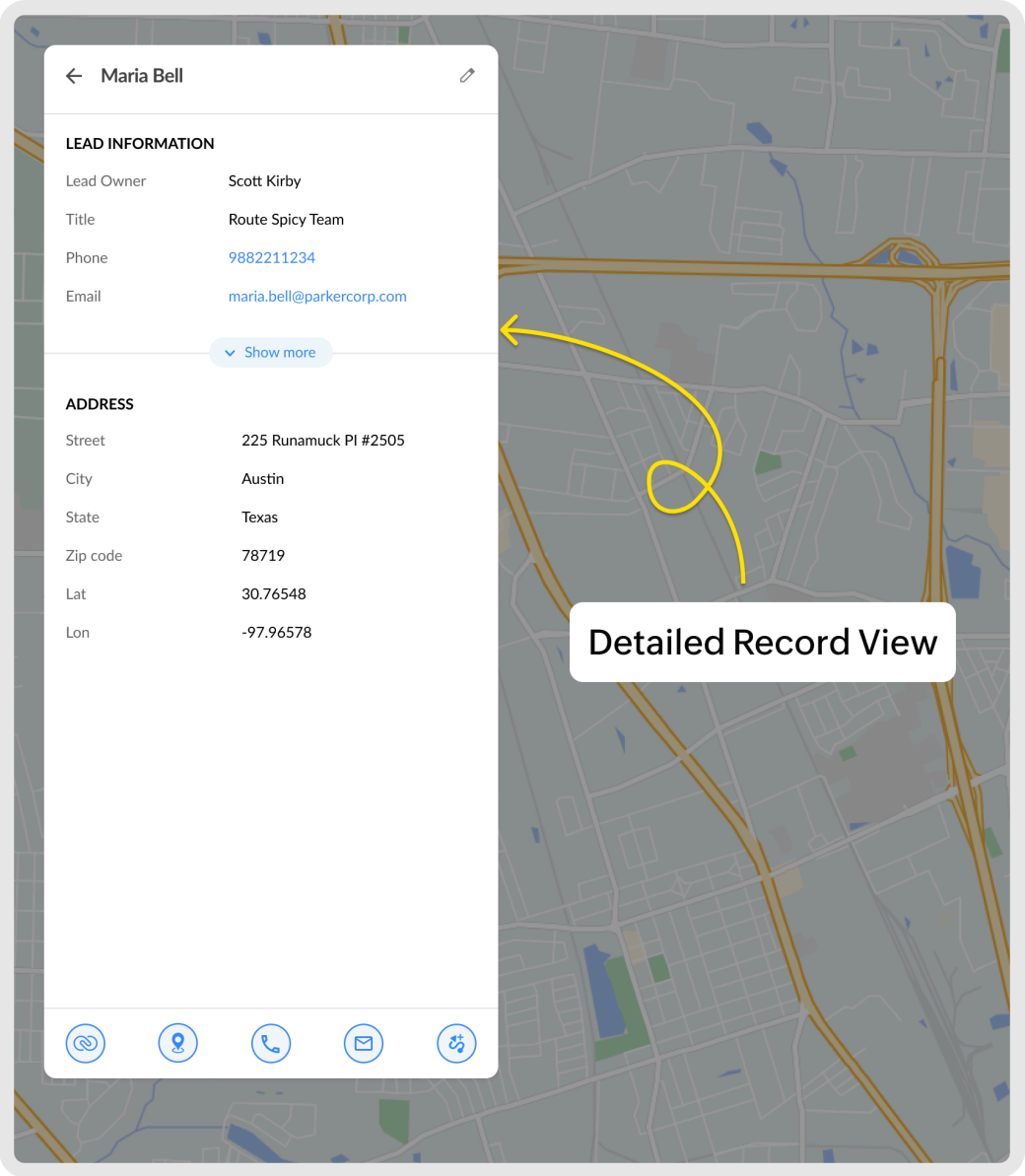
1. Click on the list icon present in the bottom toolbar.





Detailed record view

1. Click on the desired record name to view additional information from the list view. The new panel will provide the information that is available in the tabular view in Zoho CRM.

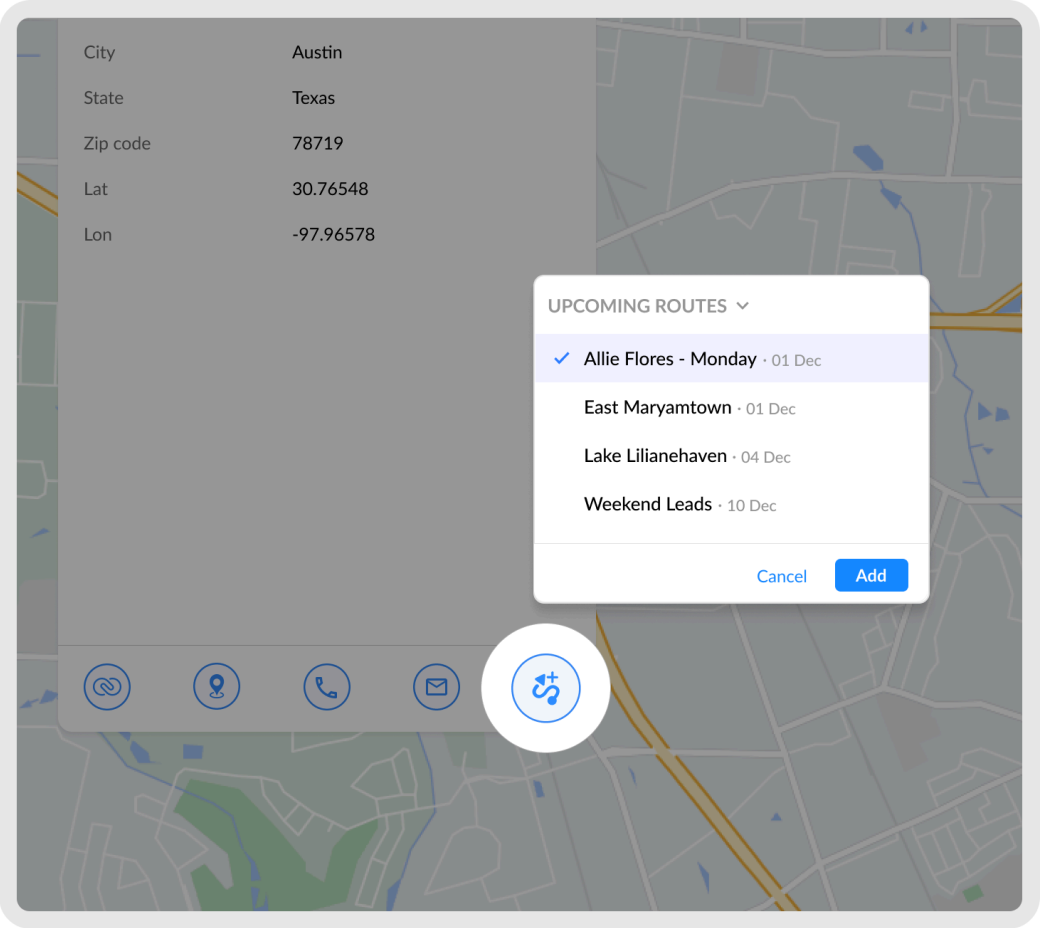


2. For more information, click the **Show More** arrow.

Additional Options

There are five additional options:

- Open in Zoho CRM icon. This redirects you to the CRM record details page.
- Nearby which shows the records around the selected record.
- Call option.
- Email option.
- Add to existing route icon.

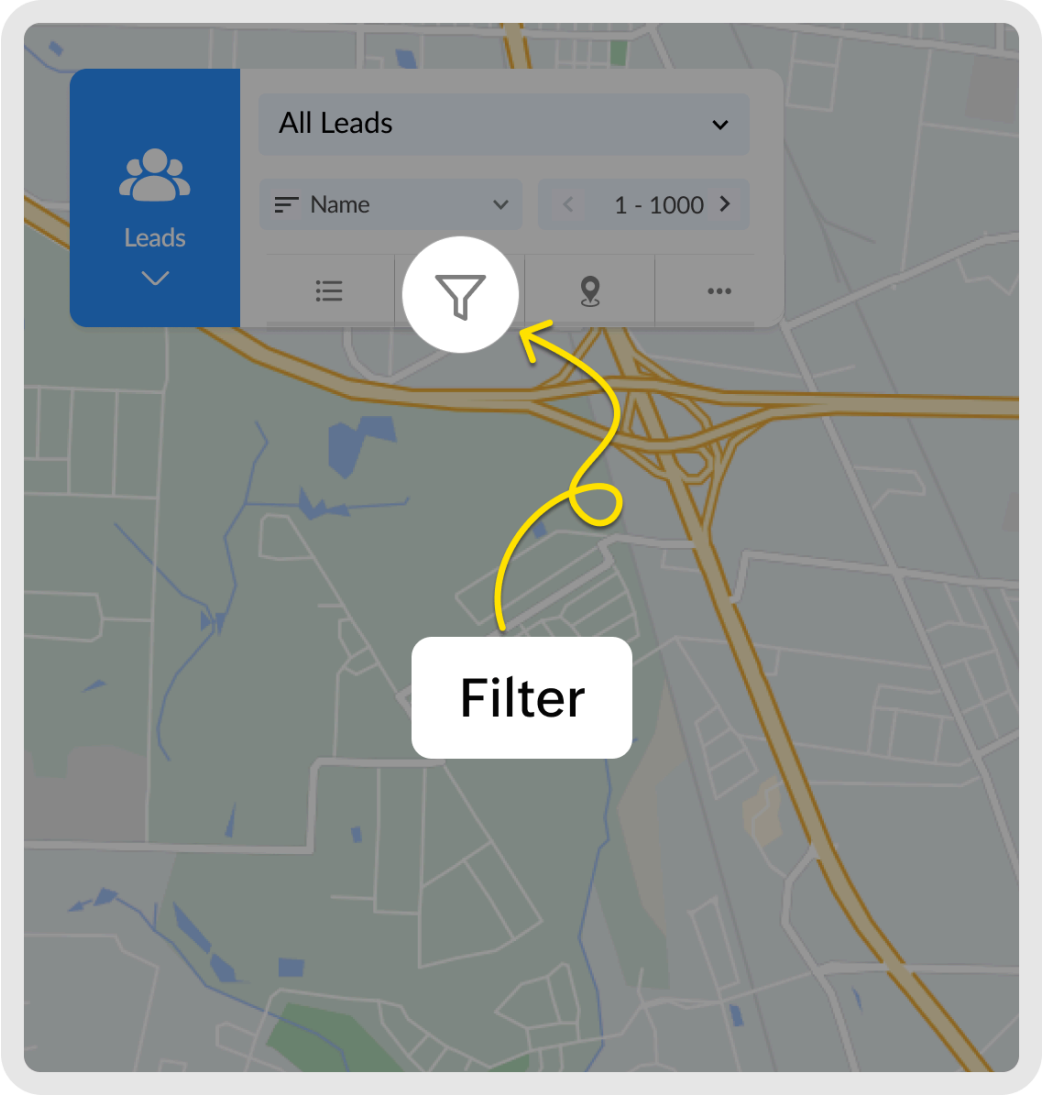


Filter

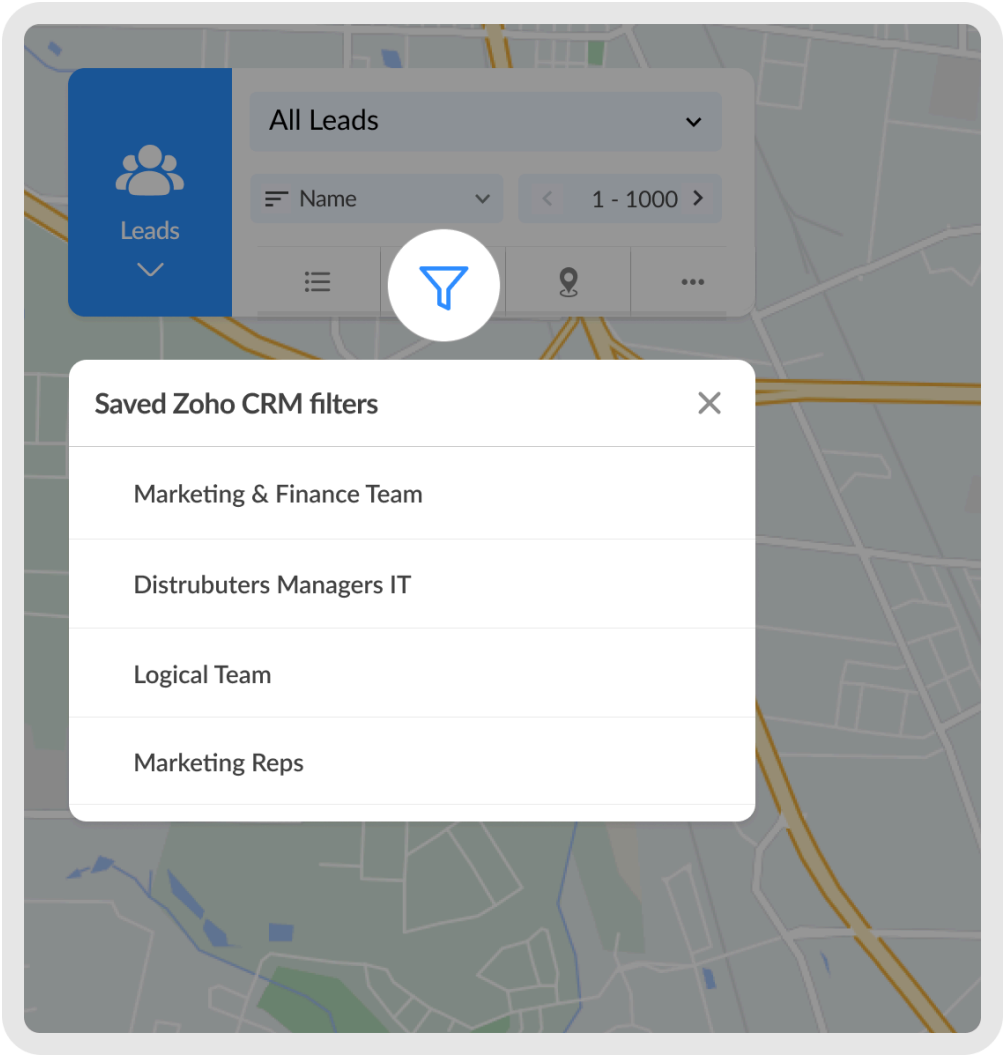
The filter feature helps narrow down the number of records in the list, so that you can quickly find the desired records with Saved Zoho CRM filters

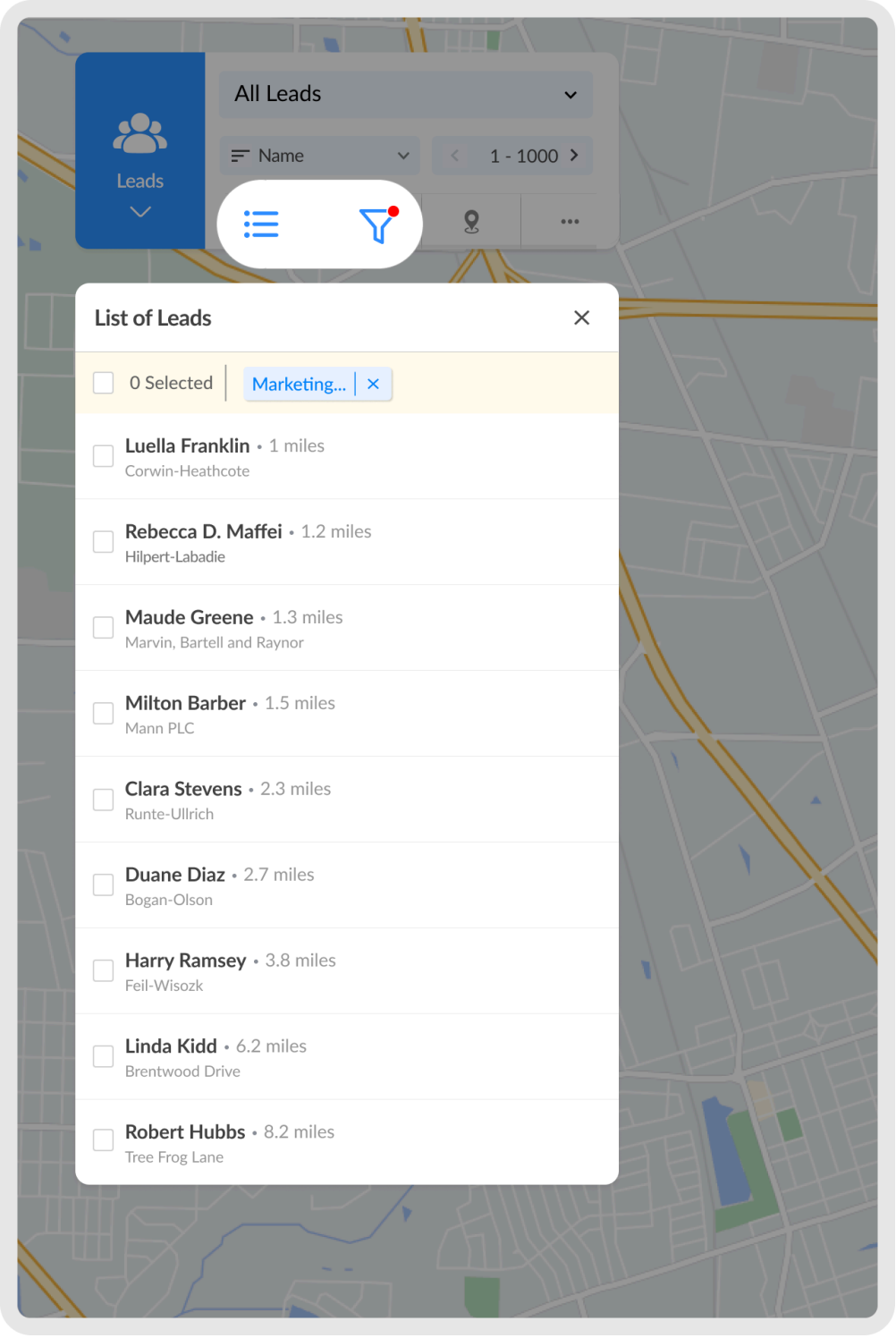
Filtering records

1. Click on the filter icon beside the list view button.


Leads
All Leads
Name
1 - 1000
Filter

2. Select a Saved Zoho CRM filter.

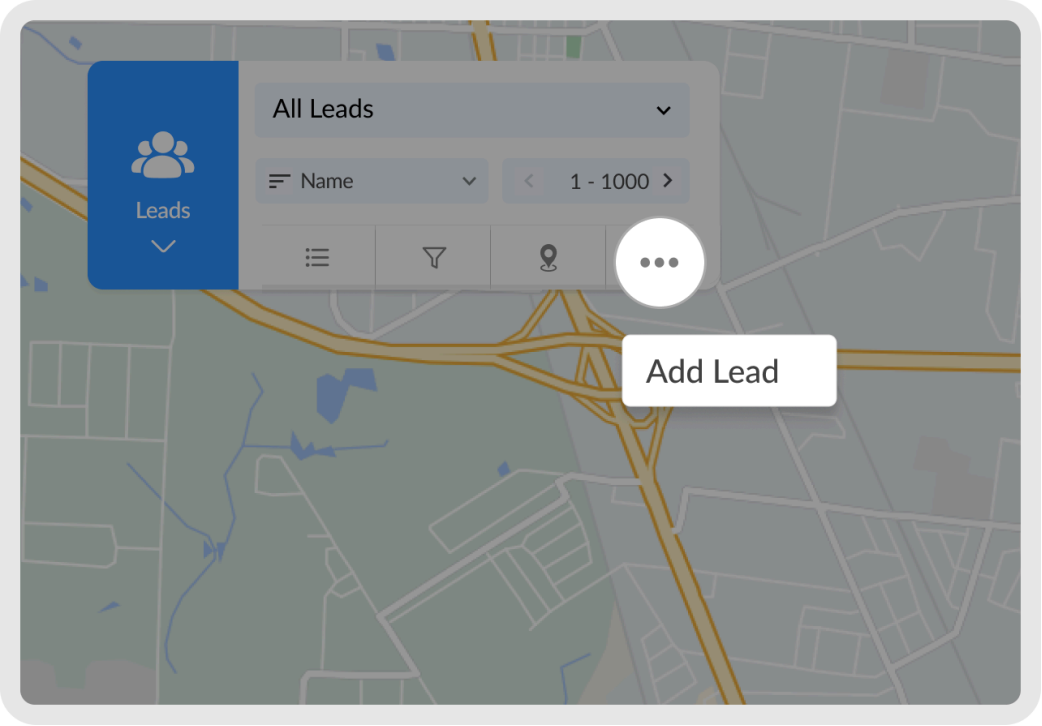

Leads
All Leads
Name
1 - 1000
Saved Zoho CRM filters
Marketing & Finance Team
Distrubuters Managers IT
Logical Team
Marketing Reps



More options

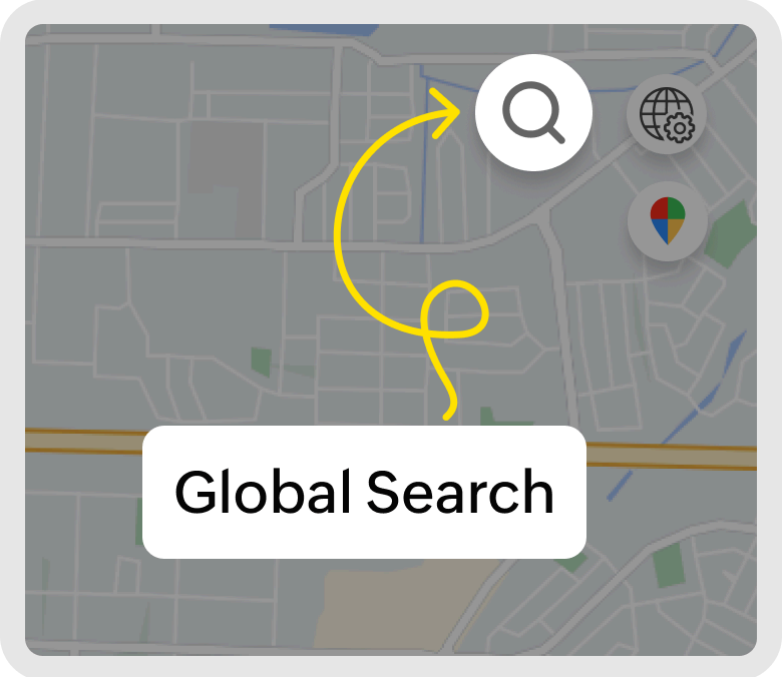
You can add records to a module by clicking on the three dots beside the **Near Me** button, then click **Add Record**.

This will redirect you to a Zoho CRM window, where you can create a new record. RouteIQ provides real-time data sync between RouteIQ and Zoho CRM. After updating data, you'll have to refresh RouteIQ if changes were made in Zoho CRM and vice versa.



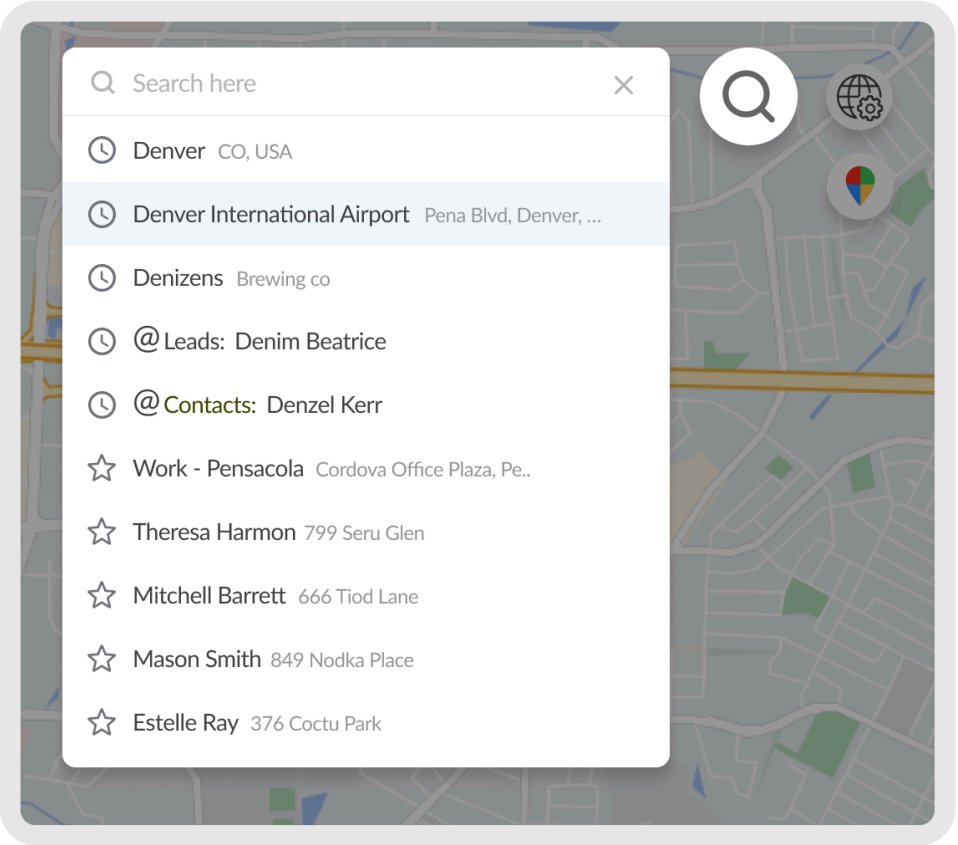
Global Search

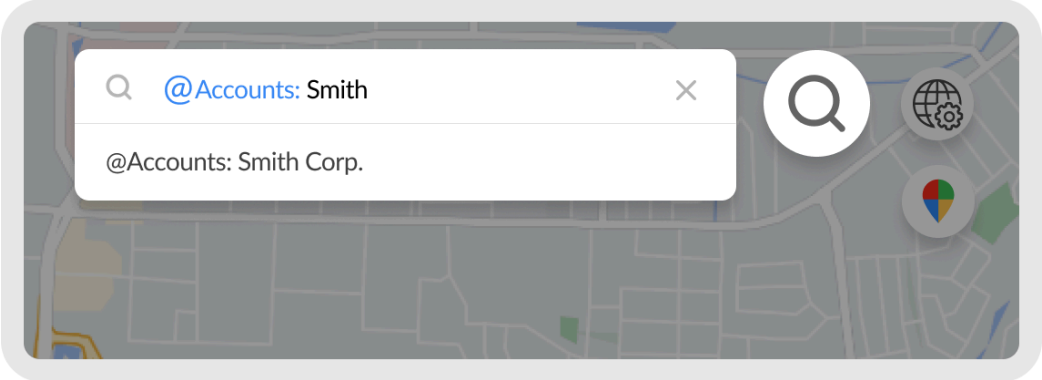
The Global Search feature helps you search for places, favorite places, routes or records.



To search of records in modules

1. Type "@" and select the module
2. Type the record name and select the autocomplete choices.





Note: Only records from integrated modules can be searched using Global Search