Default Reports & Dashboards

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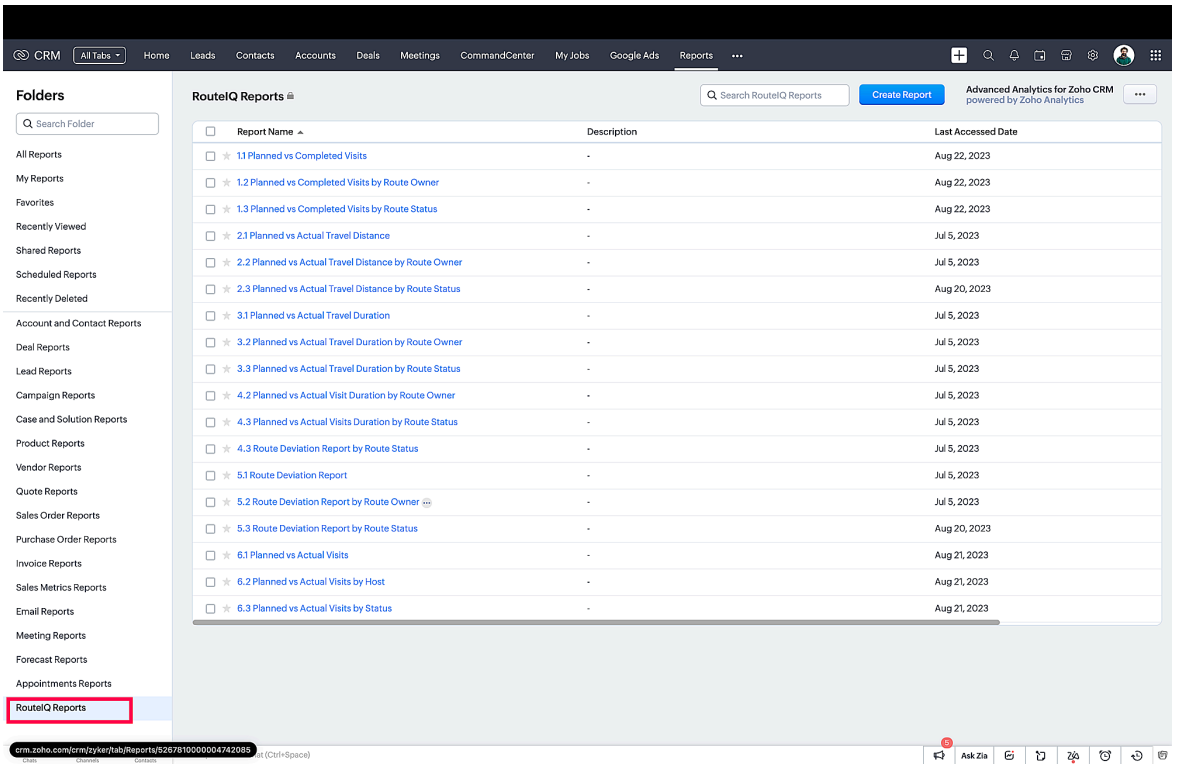
Default reports and dashboards provided by RouteIQ to give you general analytics capabilities that can be further modified or customized to suit your specific needs.

Default Reports

RouteIQ Reports folder in the Reports module in Zoho CRM contains all the default reports that are available for RouteIQ routes (RIQ Routes) and stops (Meetings).



Route Reports

We have 5 types of reports for routes (RIQ Routes) with 2 additional variants i.e. grouped by route owner and route status.

1. Planned vs Completed Visits
   This report compares planned vs. completed visits of routes and also gives the deviation by the field agent. Helping you identify who hasn't been able to achieve their route plans.
2. Planned vs Actual Travel Distance
   This report compares planned vs. actual travel distance and also gives the deviation by the field agent. Helps you identify when your field agents haven't traveled in the most optimal route.
3. Planned vs Actual Travel Duration
   This report compares planned vs. actual travel duration and also gives the deviation by the field agent. Helps you identify when your field agents have been driving too fast or too slow.
4. Planned vs Actual Visit Duration
   his report compares planned vs. actual visit duration and also gives the deviation by the field agent. Helps you identify when your field agents have overestimated or underestimated the visit's plan.
5. Route Deviation Report
   This report compares the below field of a route with its respective deviations:
   a. Planned Visits
   b. Planned Travel Distance
   c. Planned Travel Duration
   d. Planned Visits Duration

Meeting Reports

We have 1 type of report for stops (Meetings) with 2 additional variants i.e. grouped by the host and visit status.

1. Planned vs Actual Visits

2. This report compares planned vs. actual info on visits. Helping you identify who hasn't been able to achieve their visit plans.

Default Dashboards

RouteIQ dashboards can be found under the Analytics module in Zoho CRM. There are 2 default dashboards for RouteIQ:

1. RouteIQ - Org Dashboard
   This dashboard shows RouteIQ data from all users in your organization.
2. RouteIQ - My Dashboard
   This dashboard shows RouteIQ data that is specific to the user who is viewing it.

RouteIQ - My Dashboard

1. Today's Planned Visits
   This KPI shows the number of visits planned today and shows the increase or decrease percentage compared to yesterday.

2. Today's Completed Visits
   This KPI shows the number of visits completed today and shows the increase or decrease percentage compared to yesterday.

3. Today's Routes by Status
   This donut chart shows the distribution of routes based on their status for the current day.

4. This Week's Planned Visits
   This KPI shows the number of visits planned for the current week and shows the increase or decrease percentage compared to the previous week.

5. This Week's Completed Visits
   This KPI shows the number of visits completed for the current week and shows the increase or decrease percentage compared to the previous week.

6. This Week's Route by Status
   This donut chart shows the distribution of routes based on their status for the current week.

7. This Week's Planned vs Actual Mileage
   This bar chart shows the sum of planned vs actual travel distance for users in your organization.

8. This Week's Planned vs Actual Time Spent at Location
   This bar chart shows the sum of planned vs actual time spent at the location for users in your organization.

9. This Month's Planned vs Completed Visits
   This line chart shows planned vs actual visits made in the current month.

10. This Year's Planned vs Completed Visits
    This bar chart shows the planned vs completed visits made in the current year while grouping the visits by month.

RouteIQ - Org Dashboard

1. RouteIQ - My Dashboard Components +

2. Today's Completed Visits
   This shows the number of visits completed today and shows the increase or decrease percentage compared to yesterday.

3. This Month's Planned vs Completed Visits by User
   This bar chart shows the planned vs completed visits while grouping them by user for the current month.

4. This Month's Planned vs Completed Visits and Routes by User
   This tabular chart shows the sum of planned and completed visits and shows the increase or decrease percentage when compared to the previous month. The same is shown for routes as well.

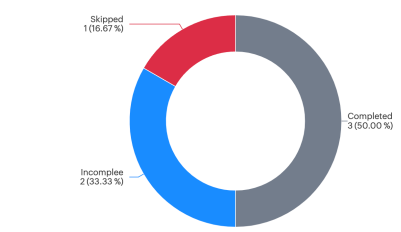
TODAY'S PLANNED VISITS
12 ▲ 9.1%
Yesterday: 11

TODAY'S COMPLETED VISITS
9 ▼ 18.2%
Yesterday: 11

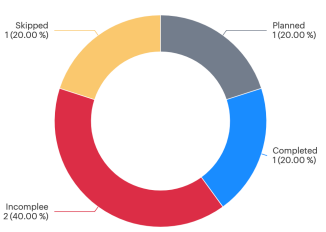
THIS WEEK'S PLANNED VISITS
49 ▲ 69.0%
Last Week: 29

THIS WEEK'S COMPLETED VISITS
42 ▲ 50.0%
Last Week: 28

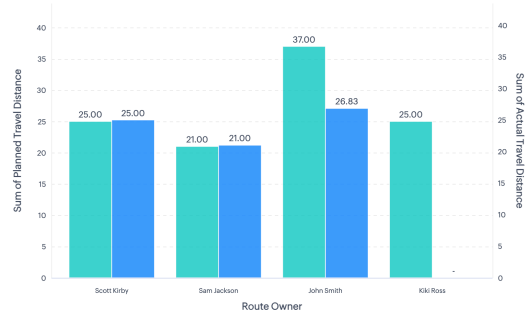
TODAY'S ROUTES BY STATUS



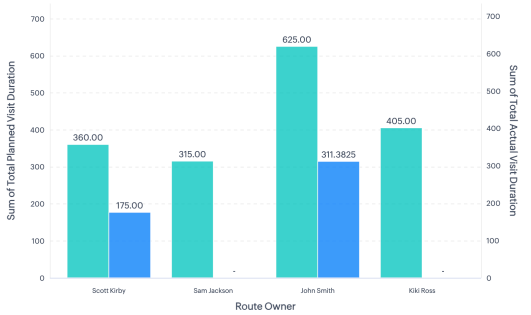
THIS WEEK'S ROUTES BY STATUS



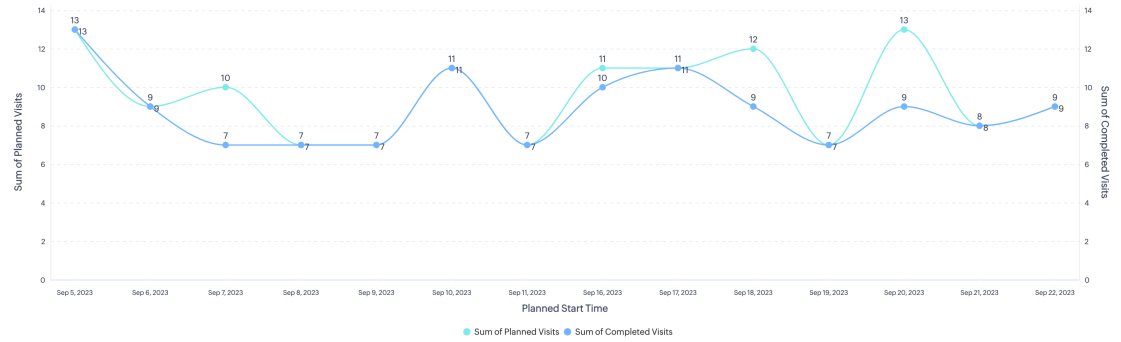
PLANNED VS ACTUAL MILEAGE BY USER



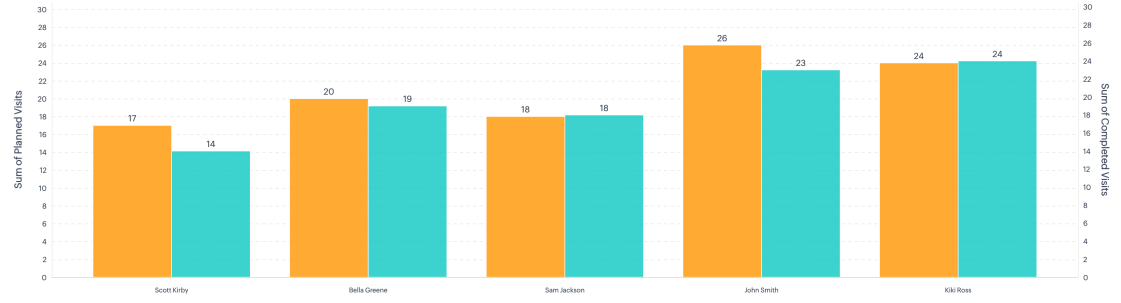
PLANNED VS ACTUAL TIME SPENT BY USER



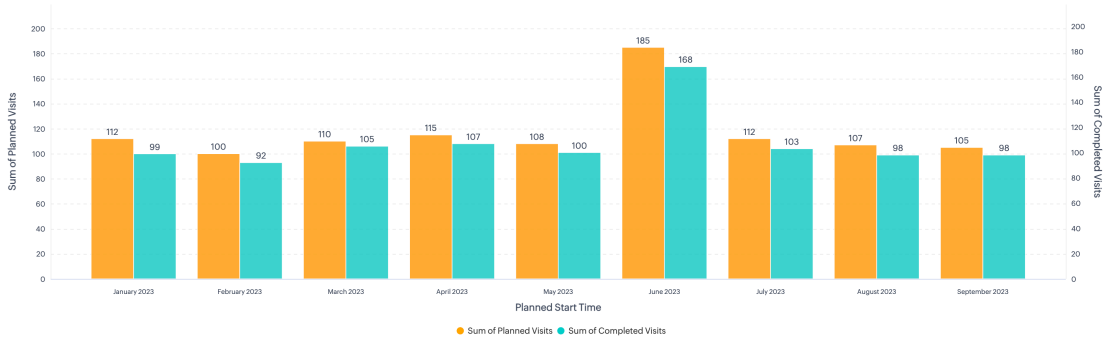
THIS MONTH'S PLANNED VS COMPLETED VISITS



THIS MONTH'S PLANNED VS COMPLETED VISITS_Cloned



THIS MONTH'S FIELD PERFORMANCE BY USER

	Bella Greene	John Smith	Sam Jackson	Scott Kirby	Kiki Ross
PLANNED VISITS	20 ▲5.3%	26 ▼27.8%	18 ▼14.3%	17 ▲13.3%	24 ▲50.0%
COMPLETED VISITS	19 ▲11.8%	23 ▼28.1%	18 0%	14 ▼6.7%	24 ▲50.0%
PLANNED ROUTES	2 0%	3 0%	2 0%	2 0%	2 0%
COMPLETED ROUTES	1 0%	1 0%	1 0%	1 ▼50%	2 ▲100.0%

THIS YEAR'S PLANNED vs completed VISITS