



Route Reports

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Create reports to analyze your field team's planned vs. actual visit, time and mileage details with their deviations.

Types of Routes

There are 2 types of Route Reports for RouteIQ:

1. Basic Route Reports
2. Advanced Route Reports

Basic Route Reports


With basic route reports you will be able to create reports with a route planned details only and not the actual details. The planned route details are available in the RIQ Routes module.

 **Feature Availability:** Available in the Standard Plan

For example: You could analyze the planned travel distance (Mileage Tracking) but to compare it with the actual traveled distance and the deviation, you would need the Professional plan.

Advanced Route Reports

With advanced route reports you will be able to create reports with a route's planned, actual and deviation details. The route details are available in the RIQ Routes module.

 Feature Availability: Available in the Professional Plan

For example: You could create reports to analyze how many stops where planned to visit and compare it with the completed visits.

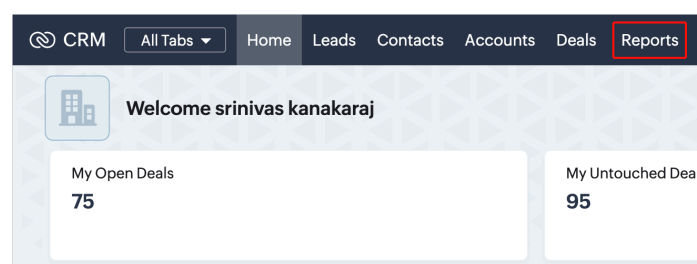
RIQ Routes Fields

Here is a list of field in the RIQ Routes module using which you can create reports.

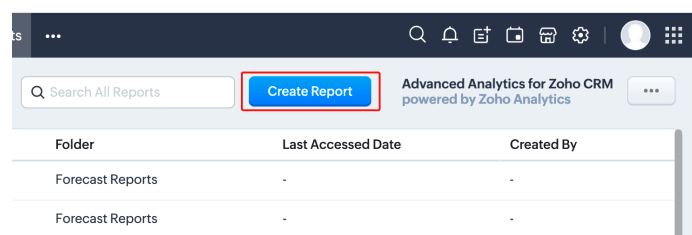
Basic Route Reports	Advanced Route Reports
RIQ Routes Name	All field from basic route reports +
RIQ Routes Owner	Completed Visits
Planned Visits	Route Status
Planned Start Time	Actual Start Time
Planned End Time	Actual Travel Distance (km)
Planned Travel Distance (km)	Actual Travel Distance (miles)
Planned Travel Distance (miles)	Actual Travel Duration (mins)
Planned Travel Duration (mins)	Total Actual Visits Duration (mins)
Total Planned Visits Duration (mins)	Travel Distance Deviation (km)
	Travel Distance Deviation (miles)

Creating Route Reports

1. Open the Reports module in Zoho CRM



2. Click Create Report.



3. Select RIQ Routes as your primary module.

Create New Report

Select Primary Module

Select the module that you would like to create a report for. For example, if you want to see all Contacts and the Deals added to them in the last month, select Contacts as the primary module.

RIQ Routes

Q RIQ Routes

✓ RIQ Routes

Cancel

Continue

4. Click on rename option

Field Performance Re... 

Report Details

Report Name

Field Performance Report

Description

Folder

RouteIQ Reports

Cancel

Done

- Rename the report
- Add a description
- Add it to a folder
- Click Done

1. Click Continue

CRM
All Tabs
Home
Leads
Contacts
Accounts
Deals
Meetings
CommandCenter
My Jobs
Google Ads
Feeds
Campaigns
Reports
...

Field Performance...
Do you want to join another report? [Joined Report](#)
Cancel
Run
Save

Columns
Filters

Columns
+

- RIQ Route Name
- Actual Start Time
- Actual Travel Distance (km)
- Actual Travel Distance (miles)
- Actual Travel Duration (mins)

Row Groups
+
No Group Selected
Column Groups
+
No Group Selected
Aggregate Columns
+
No Column Selected

Preview shown with limited number of rows. Run the report to see actual aggregate values.

RIQ ROUTE NAME	ACTUAL START TIME	ACTUAL TRAVEL DISTANCE (KM)	ACTUAL TRAVEL DISTANCE (MILES)	ACTUAL TRAVEL DURATION (MINS)
Meetings RT 01:31 PM	-	-	-	-
Leads RT 03:29 PM	-	-	-	-
Leads RT 03:29 PM	-	-	-	-
Sales Demo Meet	-	-	-	-
Sales Demo Meet	-	-	-	-
Sales Demo	-	-	-	-
Leads RT 11:42 AM	-	-	-	-
Leads RT 08:30 PM	-	-	-	-
Leads RT 09:00 AM	-	-	-	-
Leads RT 04:55 PM	-	0.0	0.0	0

Chats
Channels
Contacts
Here is your Smart Chat (Ctrl+Space)
Ask Zia
Zia

The report configuration page will open; here you can add the required columns, apply date and advanced filters, etc.

6. Add the necessary columns.

- You can group rows based on fields like Route Status, Owner, etc.
- You can aggregate numerical columns based on fields like planned visits, travel distance (Mileage Details), etc.

The screenshot shows a configuration panel with four main sections, each with a red box around its header and a plus icon to its right:

- Columns**: Contains a list of fields with expand/collapse icons: RIQ Route Name, Actual Start Time, Actual Travel Distance (km), Actual Travel Distance (miles), and Actual Travel Duration (mins).
- Row Groups**: Shows "No Group Selected".
- Column Groups**: Shows "No Group Selected".
- Aggregate Columns**: Shows "No Column Selected".

7. Click Filters and apply the necessary filters

- You can add date filters based fields like Planned or Actual Start Time
- You can add advanced filter criteria based on fields like Route Status, Owner, etc.

The 'Add Filter' dialog box is shown with the following details:

- Date Filter**: Filter based on the date fields in the modules. This date filter will be available in the reports view for quick updates.
 - Field: Actual Start Time
 - Operator: None
 - Value: Current Month (selected from a dropdown menu)
- Advanced Filter**: Add criteria based on fields across all
 - Criteria 1: None
 - Criteria 2: None
- Buttons: Cancel, Save

8. Click Run to have a view of the report and save if you save it for future use.

The screenshot shows three buttons: Cancel, Run, and Save. The Run and Save buttons are highlighted with red boxes. A help icon (?) is visible to the right of the Save button.

9. Now the report will be viewed with all the configurations applied.

CRM

All Tabs

Home

Leads

Contacts

Accounts

Deals

Meetings

CommandCenter

My Jobs

Google Ads

Feeds

Campaigns

Reports

...

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🔔

📅

📄

🖨

⚙

👤

⋮

Field Performance Rep...

CancelEditSave

Total Records : 10

🔼 FILTERS

Planned Start Time

Current Month

March 2023

Apply

Clear Filter

RIQ ROUTE NAME	RIQ ROUTE OWNER	ROUTE STATUS	PLANNED VISITS	COMPLETED VISITS
Meetings RT 01:31 PM	srinivas kanakaraj	-	-	-
Leads RT 03:29 PM	srinivas kanakaraj	-	-	-
Leads RT 03:29 PM	srinivas kanakaraj	-	-	-
Sales Demo Meet	srinivas kanakaraj	-	-	-
Sales Demo Meet	srinivas kanakaraj	-	-	-
Sales Demo	srinivas kanakaraj	-	-	-
Leads RT 11:42 AM	srinivas kanakaraj	-	-	-
Leads RT 08:30 PM	srinivas kanakaraj	-	-	-
Leads RT 09:00 AM	srinivas kanakaraj	-	-	-
Leads RT 04:55 PM	srinivas kanakaraj	Skipped	-	-

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Here is your Smart Chat (Ctrl+Space)

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Ask Zia

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Zia

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